



Filing ID #10037921

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Lee Michael Zeldin
Status: Member
State/District: NY01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/8/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
3024 Oakhill St [RP] LOCATION: Sierra Vista/Cochise, AZ, US		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ D F A EMERGING MARKETS CORE EQUITY I [OT] DESCRIPTION: 401k	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ D F A INTERNATIONAL CORE EQUITY I [OT] DESCRIPTION: 401k	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ D F A US CORE EQUITY 1 I [OT] DESCRIPTION: 401k	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ D F A US CORE EQUITY 2 I [OT] DESCRIPTION: 401k	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ DFA GLOBAL REAL ESTATE SECURITIES [OT]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: 401k					
CDF & S RETIREMENT PLAN ⇒ VANGUARD MID CAP INDEX ADM [OT]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 401k					
CDF & S RETIREMENT PLAN ⇒ VANGUARD SHORT-TERM BOND INDEX ADM [OT]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 401k					
CDF & S RETIREMENT PLAN ⇒ VANGUARD TOTAL BOND MARKET INDEX ADM [OT]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 401k					

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Carter Deluca Farrell and Schmidt Melville, NY	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- CDF & S RETIREMENT PLAN (Owner: SP)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Lee Michael Zeldin , 08/8/2020