



Filing ID #10039988

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Nancy Pelosi  
**Status:** Member  
**State/District:** CA12

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 08/13/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
11 Zinfandel Lane - Home & Vineyard [RP]	JT	\$5,000,001 - \$25,000,000	Grape Sales	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: St. Helena/Napa, CA, US					
25 Point Lobos - Commercial Property [RP]	SP	\$5,000,001 - \$25,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US					
45 Belden Place - Four Story Commercial Building [RP]	SP	\$5,000,001 - \$25,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US					
AllianceBernstein Holding L.P. Units (AB) [OL]	SP	\$500,001 - \$1,000,000	None		<input checked="" type="checkbox"/>
LOCATION: New York, NY, US					
DESCRIPTION: Limited partnership in a global asset management firm providing investment management and research services worldwide to institutional, high-net-worth and retail investors.					
Alphabet Inc. - Class A (GOOGL) [OP]	SP	\$1,000,001 - \$5,000,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: 40 call options with a strike price of \$1,200 with an expiration date of 6/18/21.					
Amazon.com, Inc. (AMZN) [ST]	SP	\$5,000,001 -	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$25,000,000			
Amazon.com, Inc. (AMZN) [OP]	SP	None	Capital Loss	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: 40 call options with a strike price of \$1700 with an expiration date of 1/17/20 and 30 call options with a strike price of \$1600 with an expiration date of 1/17/20.					
American Express Company (AXP) [OP]	SP	\$100,001 - \$250,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: 50 call options with a strike price of \$80 with an expiration date of 1/21/22.					
Apple Inc. (AAPL) [ST]	SP	\$5,000,001 - \$25,000,000	Capital Gains, Dividends	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
Apple Inc. (AAPL) [OP]	SP	\$250,001 - \$500,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: 100 call options with a strike price of \$100 with an expiration date of 1/21/22.					
Apple Inc. (AAPL) [OP]	SP	None	Capital Gains	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: 100 call options with a strike price of \$145 with an expiration date of 6/19/20.					
Aristotle LLC [OL]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US					
DESCRIPTION: Limited partnership investment in Aristotle Publishing, Inc.					
AT&T Inc. (T) [ST]	SP	\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Auberge du Soleil [OL]	SP	\$5,000,001 - \$25,000,000	Partnership Loss	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Rutherford/Napa, CA, US					
DESCRIPTION: Limited partnership investment in resort hotel.					
Bank of America - Checking Account [BA]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Washington, DC					
Bank of America - Checking Account [BA]	JT	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					
Bank of America - Checking Account [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Borel Real Estate Company [OL]	SP	\$15,001 - \$50,000	Partnership Loss, Rent	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: San Mateo/San Mateo, CA, US DESCRIPTION: Limited partnership interest in shopping center.					
City Car Services LLC [OL]	SP	\$50,001 - \$100,000	Partnership Loss	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Hingham/Plymouth, MA, US DESCRIPTION: Limited partnership investment in limousine company.					
City National Bank - Checking Account [BA]	SP	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					
City National Securities - Brokerage Money Market Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Clean Energy Fuels Corp. (CLNE) [ST]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Comcast Corporation - Class A (CMCSA) [ST]	SP	\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Congressional Credit Union - Checking Account [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Washington, DC					
CrowdStrike Holdings, Inc. - Class A (CRWD) [ST]	SP	\$1,000,001 - \$5,000,000	None		<input checked="" type="checkbox"/>
Dropbox, Inc. - Class A (DBX) [ST]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
EDI Associates [OL]	SP	\$250,001 - \$500,000	Partnership Loss	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: Sonoma/Sonoma, CA, US DESCRIPTION: Limited partnership investment in El Dorado Hotel.					
Facebook, Inc. - Class A (FB) [ST]	SP	None	Capital Gains	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Facebook, Inc. - Class A (FB) [OP]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: 20 call options with a strike price of \$150 with an expiration date of 1/17/20 and 30 call options with a strike price of \$140 with an expiration date of 1/17/20.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Financial Leasing Services [OL]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Investment consulting company.					
Forty-Five Belden Corporation [OL]	SP	\$1,000,001 - \$5,000,000	Partnership Loss	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Investment management company.					
Global Ambassador Concierge LLC [OL]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: Washington, DC, US DESCRIPTION: Limited partnership interest in concierge services for international travelers.					
Interactive Brokers Group, Inc. (IBKR) [ST]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Mathews International Mutual Fund [MF]	SP	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Microsoft Corporation (MSFT) [OP]	SP	\$1,000,001 - \$5,000,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: 150 call options with a strike price of \$130 with an expiration date of 3/19/21 and 100 call options with a strike price of \$140 with an expiration date of 3/19/21.					
Morningstar, Inc. (MORN) [ST]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Mosher Partners LP [OL]	SP	\$250,001 - \$500,000	Partnership Loss	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Sacramento/Sacramento, CA, US DESCRIPTION: Undeveloped residential real estate investment.					
Nautilus Leasing Services [OL]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Container leasing company.					
Netflix, Inc. (NFLX) [ST]	SP	\$1,000,001 - \$5,000,000	None		<input checked="" type="checkbox"/>
Netflix, Inc. (NFLX) [OP]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: 50 call options with a strike price of \$250 and an expiration date of 6/19/20.					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Nine Forty Five Battery LLC [OL]	SP	\$5,000,001 - \$25,000,000	Partnership Loss	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US					
DESCRIPTION: General partner in 945 Battery Street office building.					
Odyssey LLC [OL]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US					
DESCRIPTION: Limited partnership interest in venture capital investment firm.					
PayPal Holdings, Inc. (PYPL) [ST]	SP	\$1,000,001 - \$5,000,000	None		<input checked="" type="checkbox"/>
PayPal Holdings, Inc. (PYPL) [OP]	SP	\$500,001 - \$1,000,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: 50 call options with a strike price of \$100 with an expiration date of 1/21/22.					
Piatti Restaurant Company [OL]	SP	\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Tiburon/Marin, CA, US					
DESCRIPTION: Limited partnership investment in restaurant company.					
QUALCOMM Incorporated (QCOM) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
REOF XX, LLC [AB]	SP	\$250,001 - \$500,000	Partnership Loss	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
DESCRIPTION: Investment in LLC which acquired five Courtyard Marriott hotels located in Fairfax, VA (one), suburban Baltimore, MD (two), and San Antonio, TX (two).					
REOF XXI, LLC [AB]	SP	\$250,001 - \$500,000	Partnership Income	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Investment in LLC which is acquiring three unique office buildings with a common address of 222 Kearny Street in San Francisco, CA.					
Russell Ranch LLC [OL]	SP	\$5,000,001 - \$25,000,000	Partnership Loss	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Sacramento/Sacramento, CA, US					
DESCRIPTION: Limited partner in undeveloped residential real estate investment.					
Salesforce.com Inc (CRM) [ST]	SP	\$1,000,001 - \$5,000,000	None		<input checked="" type="checkbox"/>
Salesforce.com Inc (CRM) [OP]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: 100 call options with a strike price of \$140 and an expiration date of 6/19/20.					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Sierra Vista Baseline Investors LP [OL]	SP	\$250,001 - \$500,000	Partnership Loss	\$1 - \$200	<input type="checkbox"/>
LOCATION: Sacramento/Sacramento, CA, US DESCRIPTION: Limited partnership in undeveloped real estate investment.					
Slack Technologies, Inc. Class A (WORK) [ST]	SP	\$250,001 - \$500,000	None		<input checked="" type="checkbox"/>
Square, Inc. Class A (SQ) [ST]	SP	\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
Stoneridge LLC [OL]	SP	\$250,001 - \$500,000	Partnership Income	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: Sacramento/Sacramento, CA, US DESCRIPTION: Limited partner in undeveloped residential real estate investment.					
Tesla, Inc. (TSLA) [OP]	SP	\$500,001 - \$1,000,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: 25 call options with a strike price of \$500 with an expiration date of 3/18/22.					
Thirteen Hundred One Sansome LLC [OL]	SP	\$5,000,001 - \$25,000,000	Partnership Income, Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: General partner in 1301 Sansome Street office building.					
Tripath Technology Inc. Common Stock [PS]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Common stock not actively traded.					
Trivium LLC [OL]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: San Francisco/San Francisco, CA, US DESCRIPTION: Limited partnership investment in E-business software solutions company.					
Union Bank of California - Checking Account [BA]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					
Union Bank of California - Money Market Account [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					
Union Bank of California - Pelosi Trust Checking Account [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Visa Inc. (V) [ST]	SP	\$5,000,001 - \$25,000,000	Capital Gains, Dividends	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
Walt Disney Company (DIS) [ST]	SP	\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Walt Disney Company (The) (DIS) [OP]	SP	\$500,001 - \$1,000,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: 100 call options with a strike price of \$100 with an expiration date of 1/21/22.					
Wells Fargo Bank - Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: San Francisco, CA					

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE B: TRANSACTIONS

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
AllianceBernstein Holding L.P. Units (AB) [OL]	SP	12/22/2020	P	\$500,001 - \$1,000,000	
LOCATION: New York, NY, US					
DESCRIPTION: Purchased 20,000 units in a global asset management firm providing investment management and research services worldwide to institutional, high-net-worth and retail investors.					
Alphabet Inc. - Class A (GOOGL) [OP]	SP	02/27/2020	P	\$500,001 - \$1,000,000	
DESCRIPTION: Purchased 40 call options with a strike price of \$1200 and an expiration date of 6/18/2021.					
Amazon.com, Inc. (AMZN) [ST]	SP	01/16/2020	P	\$1,000,001 - \$5,000,000	
DESCRIPTION: Exercised 30 call options (3,000 shares) expiring 1/17/20 at a strike price of \$1600.					
Amazon.com, Inc. (AMZN) [OP]	SP	01/16/2020	S	\$250,001 - \$500,000	<input type="checkbox"/>
DESCRIPTION: Sold 20 call options with a strike price of \$1,700 and an expiration date of 1/17/20.					
Amazon.com, Inc. (AMZN) [OP]	SP	01/16/2020	S	\$250,001 - \$500,000	<input type="checkbox"/>
DESCRIPTION: Sold 20 call options with a strike price of \$1,600 and an expiration date of 1/17/20.					
American Express Company (AXP) [OP]	SP	06/24/2020	P	\$100,001 - \$250,000	
DESCRIPTION: Purchased 50 call options with a strike price of \$80 and an expiration date of 1/21/2022.					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Apple Inc. (AAPL) [ST]	SP	05/8/2020	S (partial)	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 1,700 shares.					
Apple Inc. (AAPL) [ST]	SP	05/8/2020	S (partial)	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 3,000 shares.					
Apple Inc. (AAPL) [ST]	SP	05/8/2020	S (partial)	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 3,300 shares.					
Apple Inc. (AAPL) [OP]	SP	06/18/2020	S	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 100 call options with a strike price of \$145 and an expiration date of 6/19/2020.					
Apple Inc. (AAPL) [ST]	SP	11/6/2020	S (partial)	\$500,001 - \$1,000,000	<input type="checkbox"/>
DESCRIPTION: Contribution of 4,500 shares held personally to the Paul F. Pelosi Endowed Fund at Georgetown University.					
Apple Inc. (AAPL) [OP]	SP	12/22/2020	P	\$250,001 - \$500,000	
DESCRIPTION: Purchased 100 call options with a strike price of \$100 and an expiration date of 1/21/22.					
CrowdStrike Holdings, Inc. - Class A (CRWD) [ST]	SP	09/3/2020	P	\$500,001 - \$1,000,000	
DESCRIPTION: Purchased 5,000 shares.					
Facebook, Inc. - Class A (FB) [ST]	SP	01/16/2020	P	\$250,001 - \$500,000	
DESCRIPTION: Exercised 30 call options (3,000 shares) expiring 1/17/20 at a strike price of \$140.					
Facebook, Inc. - Class A (FB) [ST]	SP	01/16/2020	P	\$250,001 - \$500,000	
DESCRIPTION: Exercised 20 call options (2,000 shares) expiring 1/17/20 at a strike price of \$150.					
Facebook, Inc. - Class A (FB) [ST]	SP	05/8/2020	S (partial)	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 5,000 shares.					
Facebook, Inc. - Class A (FB) [ST]	SP	08/7/2020	S	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
DESCRIPTION: Contribution of 5,000 shares held personally to The Paul & Nancy Pelosi Charitable Foundation via transfer between brokerage accounts.					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Interactive Brokers Group, Inc. - Class A (IBKR) [ST]	SP	05/8/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 3,000 shares.					
Microsoft Corporation (MSFT) [OP]	SP	02/20/2020	P	\$250,001 - \$500,000	
DESCRIPTION: Purchased 100 call options with a strike price of \$140 and an expiration date of 3/19/2021.					
Microsoft Corporation (MSFT) [OP]	SP	02/21/2020	P	\$500,001 - \$1,000,000	
DESCRIPTION: Purchased 100 call options with a strike price of \$130 and an expiration date of 3/19/2021.					
Microsoft Corporation (MSFT) [OP]	SP	02/28/2020	P	\$100,001 - \$250,000	
DESCRIPTION: Purchased 50 call options with a strike price of \$130 and an expiration date of 3/19/2021.					
Morningstar, Inc. (MORN) [ST]	SP	05/8/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 1,700 shares.					
Netflix, Inc. (NFLX) [ST]	SP	06/18/2020	P	\$1,000,001 - \$5,000,000	
DESCRIPTION: Exercised 50 call options (5,000 shares) expiring 6/19/2020 at a strike price of \$250.					
PayPal Holdings, Inc. (PYPL) [ST]	SP	06/12/2020	P	\$500,001 - \$1,000,000	
DESCRIPTION: Purchased 5,000 shares.					
PayPal Holdings, Inc. (PYPL) [ST]	SP	06/12/2020	P	\$500,001 - \$1,000,000	
DESCRIPTION: Purchased 5,000 shares.					
PayPal Holdings, Inc. (PYPL) [OP]	SP	06/24/2020	P	\$250,001 - \$500,000	
DESCRIPTION: Purchased 50 call options with a strike price of \$100 and an expiration date of 1/21/2022.					
REOF XX, LLC [AB]	SP	01/21/2020	P	\$50,001 - \$100,000	
DESCRIPTION: Additional investment in LLC which acquired five Courtyard by Marriott hotels located in Fairfax, VA (one), suburban Baltimore, MD (two) and San Antonio, TX (two).					
REOF XX, LLC [AB]	SP	04/28/2020	P	\$15,001 - \$50,000	
DESCRIPTION: Additional investment in LLC which acquired five Courtyard by Marriott hotels located in Fairfax, VA (one), suburban Baltimore,					

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
MD (two) and San Antonio, TX (two).					
REOF XX, LLC [AB]	SP	11/5/2020	P	\$15,001 - \$50,000	
DESCRIPTION: Additional investment in LLC which acquired five Courtyard by Marriott hotels located in Fairfax, VA (one), suburban Baltimore, MD (two) and San Antonio, TX (two).					
Salesforce.com Inc (CRM) [ST]	SP	06/18/2020	P	\$1,000,001 - \$5,000,000	
DESCRIPTION: Exercised 100 call options (10,000 shares) expiring 6/19/2020 at a strike price of \$140.					
Slack Technologies, Inc. Class A (WORK) [ST]	SP	02/20/2020	P	\$250,001 - \$500,000	
DESCRIPTION: Purchased 10,000 shares.					
Tesla, Inc. (TSLA) [OP]	SP	12/22/2020	P	\$500,001 - \$1,000,000	
DESCRIPTION: Purchased 25 call options with a strike price of \$500 and an expiration date of 3/18/22.					
Visa Inc. (V) [ST]	SP	05/8/2020	S (partial)	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 3,000 shares.					
Visa Inc. (V) [ST]	SP	05/8/2020	S (partial)	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 3,000 shares.					
Walt Disney Company (DIS) [OP]	SP	12/22/2020	P	\$500,001 - \$1,000,000	
DESCRIPTION: Purchased 100 call options with a strike price of \$100 and an expiration date of 1/21/22.					

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

<b>Source</b>	<b>Type</b>	<b>Amount</b>
Financial Leasing Services	Spouse Salary	N/A
45 Belden Corporation	Spouse Management Fee	N/A
Fairfield Associates	Spouse Management Fee	N/A

## SCHEDULE D: LIABILITIES

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
JT	Union Bank of California	September 2016	Mortgage on 11 Zinfandel Lane, St. Helena, CA	\$5,000,001 - \$25,000,000
SP	Union Bank of California	December 2017	Mortgage on 45 Belden Place, San Francisco, CA	\$1,000,001 - \$5,000,000
SP	Wells Fargo Bank	June 2017	Mortgage on 25 Point Lobos Avenue, San Francisco, CA	\$1,000,001 - \$5,000,000
SP	Union Bank of California	July 2002	Equity Line of Credit on 11 Zinfandel Lane, St. Helena, CA	\$500,001 - \$1,000,000
SP	City National Bank	July 2011	Brokerage Collateral Loan	\$1,000,001 - \$5,000,000
JT	Union Bank of California	September 2007	Mortgage on 2640 Broadway, San Francisco, CA	\$5,000,001 - \$25,000,000
SP	Bank of America	November 2006	Mortgage on 3030 K Street, Washington, DC	\$1,000,001 - \$5,000,000
JT	Union Bank of California	December 2012	Equity Line of Credit on 2640 Broadway, San Francisco, CA	\$500,001 - \$1,000,000
SP	City National Securities	Ongoing	Brokerage Margin Account	\$5,000,001 - \$25,000,000

#### SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
CFO & Secretary	The Paul & Nancy Pelosi Charitable Foundation
Congressional Advisory Board	International Women's Democracy Center
Board of Trustees Member Ex Officio	Kennedy Center
Honorary Member	Wheelchair Foundation
Distinguished Board Member	National Organization of Italian American Women

#### 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.

## **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. Nancy Pelosi , 08/13/2021