



Filing ID #10052606

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Lauren Underwood
Status: Member
State/District: IL14

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 05/15/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alliant Credit Union [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DuPage Credit Union [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Health Savings Account ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Health Savings Account ⇒ Fidelity US Sustainability Fund (FITLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity Health Savings Account ⇒ Nuveen Winslow Large Cap Growth ESG CL A (NWCAX) [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Investment ⇒ Vanguard 500 Index Fund (VFIAX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Government Printing Office Federal Credit Union [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard Roth IRA ⇒ Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Roth IRA ⇒ Vanguard Target Retirement 2070 Fund (VSVNX) [MF]		\$1 - \$1,000		Tax-Deferred	<input checked="" type="checkbox"/>

* 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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Health Savings Account ⇒ Fidelity US Sustainability Fund (FITLX) [MF]		04/25/2022	P	\$1,001 - \$15,000	
Vanguard Roth IRA ⇒ Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF]		08/8/2022	P	\$1,001 - \$15,000	
Vanguard Roth IRA ⇒ Vanguard Target Retirement 2070 Fund (VSVNX) [MF]		11/11/2022	P	\$1,001 - \$15,000	

* 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 C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Freedom Mortgage	December 2020	Mortgage on personal residence	\$250,001 - \$500,000

COMMENTS: Mortgage sold by Arvest Central Mortgage Company to Freedom Mortgage in 2022.

SCHEDULE E: POSITIONS

Position	Name of Organization
Commission Member	The CSIS Commission on Strengthening America's Health Security

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
J Street Education Fund	02/18/2022	02/25/2022	Chicago, IL - Tel Aviv, Israel - Chicago, IL	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

Source	Activity	Date	Amount	Charity Name
Society of OB/GYN Hospitalists (SOGH)	Speech	09/12/2022	\$1,000.00	
University of Michigan, School of Nursing	Speech	04/30/2022	\$500.00	

SCHEDULE A AND B ASSET CLASS DETAILS

- Fidelity Health Savings Account
LOCATION: US
- Fidelity Investment
LOCATION: US
- Vanguard Roth IRA

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. Lauren Underwood , 05/15/2023