



Filing ID #10050775

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Peter A. DeFazio
Status: Former Member
State/District: OR04

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2023
Filing Date: 01/14/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
1/2 ownership share 5388o Pine Grove rd Lapine oregon [RP] LOCATION: deschutes, OR, US	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
ameritrade ⇒ Antigenics Inc (ANTI) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
ameritrade ⇒ Marrone Bio Innovations, Inc. (MBII) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
ameritrade ⇒ Oakmark equity income [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ING/VOYA ⇒ 402oVoya Fixed Plus Account III [MF] DESCRIPTION: purchased by exchange	SP	\$500,001 - \$1,000,000	Tax-Deferred		<input type="checkbox"/>
ING/VOYA ⇒ Vanguard Target Retirement 2025 Fnd Inv [MF] DESCRIPTION: exchanged - you call it a purchase	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
oakmark select [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Pentagon Federal Credit Union [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
selco credit union [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
selco credit union [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Touchstone Balanced Fund [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: 5,000 withdrawn					
wright patman federal credit union [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: deposit of funds withdrawn from TSP					

* 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?
ameritrade ⇒ oakmark equity income [IR]		11/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: required minimum distribution					
ING/VOYA ⇒ oakmark equity income [MF]	SP	10/17/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: required minimum distribution					

* 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
JT	Mr Cooper	/ARC home sold loan to Mr Cooper in June 2021	Home mortgage	\$100,001 - \$250,000

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

- ameritrade
- ameritrade (Owner: SP)
- ING/VOYA (Owner: SP)
DESCRIPTION: 457 plan ING changed its name to voya

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. Peter A. DeFazio , 01/14/2023