



Filing ID #10050472

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Theodore E. Deutch  
**Status:** Former Member  
**State/District:** FL22

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2022  
**Filing Date:** 01/27/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Blackrock Strategic Income [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Blackrock Strategic Income [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DFA Emerging Markets Core [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DFA Int'l Core Equity [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DFA Int'l Core Equity - Institutional [MF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
DFA US Small Cap Value [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Dodge & Cox Income Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Doubleline Shiller Enhanced Cape Strategy [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Goldman Sachs GQG Partners International Opportunities Fund (GSIMX) [EF]		\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Goldman Sachs Note (40057CGU9) [CS] DESCRIPTION: Note matured 1/21/22		None	Interest	\$1 - \$200	<input type="checkbox"/>
Invesco QQQ Trust [EF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Invesco S&P 500 High Quality [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares iBonds Dec 2024 Term Corp ETF [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares MSCI Intl ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Russell 3000 Index ETF [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
iShares S&P 400 Mid Value Index [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares S&P 400 Mid Value Index [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
JP Morgan Strategic Income [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JP Morgan Ultra Short Income ETF [EF]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Lincoln Financial VU Life ⇒ AFIS Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial VU Life ⇒ AFIS International [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial VU Life ⇒ Goldman Sachs Note (40057KZF3) [CS] DESCRIPTION: Due date 08/02/2023		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Lincoln Financial VU Life ⇒ iShares Edge MSCI Intl QTL [EF] DESCRIPTION: Complete sale of position on 4/28/2022		None	None		<input checked="" type="checkbox"/>
Lincoln Financial VU Life ⇒ JP Morgan Note (48133FWN1) [CS] DESCRIPTION: Due 1/12/24		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Lincoln Financial VU Life ⇒ LN Special Opportunities [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial VU Life ⇒ PIMCO Investment Grade Corporate ETF [EF] DESCRIPTION: Complete sale of position on 1/26/2022		None	None		<input checked="" type="checkbox"/>
Lincoln Financial VU Life ⇒ Schwab Short Term US Treasury ETF [EF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Lincoln Financial VU Life ⇒ Stone Ridge High Yield Reinsurance Risk Fund [EF] DESCRIPTION: Complete sale of position on 8/22/2022		None	None		<input checked="" type="checkbox"/>
Lincoln Financial VU Life ⇒ Vanguard Russell 3000 ETF [EF] DESCRIPTION: Complete sale of position on 5/25/2022		None	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
Schwab Bank Deposit [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Schwab Bank Deposit [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Stoneridge Alt Lend [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
T. Rowe Price Summit Municipal [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Thornburg Ltd Term Income [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Thornburg Ltd Term Muni Income [MF]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Communication Services ETF [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard Communication Services ETF (VOX) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Vanguard Conservative Growth [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Vanguard Dividend Appreciation ETF [EF]		\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Income (Moderate) [MF]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Vanguard Ltd Term Tax Exempt [MF]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Accounts [BA]		\$1,001 - \$15,000	None		<input 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?
Lincoln Financial VU Life ⇒ DFA Emerging Markets Core [EF]		05/24/2022	P	\$1,001 - \$15,000	
Lincoln Financial VU Life ⇒ DFA Int'l Core Equity [EF]		05/24/2022	P	\$1,001 - \$15,000	
Lincoln Financial VU Life ⇒ Goldman Sachs Note (40057KZF3) [CS] DESCRIPTION: Due date 08/02/2023		02/2/2022	P	\$15,001 - \$50,000	
Lincoln Financial VU Life ⇒ iShares Edge MSCI Intl QTL [MF]		04/28/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
Lincoln Financial VU Life ⇒ iShares iBonds Dec 2024 Term Corp ETF [EF]		05/16/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Lincoln Financial VU Life ⇒ iShares iBonds Dec 2024 Term Corp ETF [EF]		03/8/2022	P	\$1,001 - \$15,000	
Lincoln Financial VU Life ⇒ iShares iBonds Dec 2024 Term Corp ETF [EF]		05/16/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Lincoln Financial VU Life ⇒ iShares Russell 3000 Index ETF [EF]		05/25/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Lincoln Financial VU Life ⇒ JP Morgan Note (48133FWN1) [CS] DESCRIPTION: Due 01/12/24		05/2/2022	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Lincoln Financial VU Life ⇒ Pimco Investment Grade Corporate Bond Index Exchange-Traded Fund (CORP) [EF]		01/26/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Lincoln Financial VU Life ⇒ Schwab Short Term US Treasury ETF [EF]		05/25/2022	P	\$1,001 - \$15,000	
Lincoln Financial VU Life ⇒ Schwab Short Term US Treasury ETF [EF]		06/1/2022	P	\$1,001 - \$15,000	
Lincoln Financial VU Life ⇒ Schwab Short Term US Treasury ETF [EF]		08/30/2022	P	\$1,001 - \$15,000	
Lincoln Financial VU Life ⇒ Stone Ridge High Yield Reinsurance Risk Fund [MF]		Quarterly	S	\$1,001 - \$15,000	<input type="checkbox"/>
Lincoln Financial VU Life ⇒ Vanguard Russell 3000 ETF [EF]		05/16/2022	P	\$1,001 - \$15,000	
Lincoln Financial VU Life ⇒ Vanguard Russell 3000 ETF [EF]		05/25/2022	S	\$1,001 - \$15,000	<input 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 C: EARNED INCOME

Source	Type	Amount
Hillel of Broward and Palm Beach, Boca Raton, FL	Spouse salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Nationstar Mortgage Holdings Inc.	October 2020	Mortgage on 12373 Cascades Pointe Drive, Boca Raton, FL	\$100,001 - \$250,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
February 2022	American Jewish Committee & Ted Deutch	Employment as Chief Executive Officer, effective October 1, 2022.

## 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?
American Israel Education Foundation	02/19/2022	02/27/2022	Miami - Israel - Miami	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
The German Marshall Fund of the United States	06/26/2022	06/29/2022	Ft. Lauderdale, FL - Brussels, Belgium - Ft. Lauderdale, FL	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Aspen Institute/Democracy Fund/Rockefeller Bros. Fund	08/29/2022	09/4/2022	Ft. Lauderdale, FL - Reykjavik, Iceland - Ft. Lauderdale, FL	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Lincoln Financial VU Life

## 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. Theodore E. Deutch , 01/27/2023