



Filing ID #10072768

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Sam T. Liccardo
Status: Member
State/District: CA16

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2024
Filing Date: 11/03/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Express Savings [BA]		\$15,001 - \$50,000	Interest	Not Applicable	\$2,501 - \$5,000
Residential Property [RP]	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	\$50,001 - \$100,000
LOCATION: Imperial Beach / San Diego County, CA, US					
Vacation Property [RP]		\$1,000,001 - \$5,000,000	Rent	None	\$15,001 - \$50,000
LOCATION: Tahoe City/ Placer County, CA, US					
DESCRIPTION: Condominium owned by four siblings, and sold in November of 2024.					
CalPERS Pension Sam Liccardo ⇒ CalPERS [DB]		\$250,001 - \$500,000	Capital Gains, Interest	Not Applicable	None
Fidelity 457 ⇒ BrokerageLink ⇒ Fidelity Global Innovators Class Series A U\$ DSC (FNLIIX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity 457 ⇒ BrokerageLink ⇒ Fidelity Select Utilities Growth Portfolio (FSUTX) [MF]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity 457 ⇒ BrokerageLink ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ 92210J135 MISSIONSQ PLUS R13 [OT] DESCRIPTION: residual Mutual Fund -- primarily treasuries		\$1,001 - \$15,000	Tax-Deferred		
Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ Vanguard FTSE All-World ex-US Index Fund Insti Shs (VFWSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ American States Water Company Common Stock (AWR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Bank of America CD (6/2025) [BA]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Bristol-Myers Squibb Company Common Stock (BMY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Citibank (6/2025) [BA] DESCRIPTION: Certificate of Deposit, Maturity June of 2025		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ FHLB (3/2030) [GS] DESCRIPTION: Fixed coupon bond w/ maturity of March 2030.		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ FHLB (9/2026) [GS] DESCRIPTION: Fixed coupon bond, maturity date September 2026.		\$50,001 - \$100,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒		\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Prime Advantage Fund [BA]		\$100,000			
DESCRIPTION: Money market fund.					
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$100,001 - \$250,000		Tax-Deferred	
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ SOFI (2024) [BA]		\$1,001 - \$15,000		Tax-Deferred	
DESCRIPTION: Certificate of Deposit, Maturity in 2024.					
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ SWVXX [BA]		\$100,001 - \$250,000		Tax-Deferred	
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]		\$15,001 - \$50,000		Tax-Deferred	
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$15,001 - \$50,000		Tax-Deferred	
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Invesco Water Resources ETF (PHO) [EF]		\$15,001 - \$50,000		Tax-Deferred	
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000		Tax-Deferred	
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ NovoCure Limited - Ordinary Shares (NVCR) [ST]		\$1,001 - \$15,000		Tax-Deferred	
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000		Tax-Deferred	
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$15,001 - \$50,000		Tax-Deferred	
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$15,001 - \$50,000		Tax-Deferred	
Schwab ⇒ Schwab SEP IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000		Tax-Deferred	

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$15,001 - \$50,000	Interest	Not Applicable	\$201 - \$1,000
Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	Not Applicable	\$1,001 - \$2,500
Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ SWVXX [BA]		\$1,001 - \$15,000	Interest	Not Applicable	\$1 - \$200
Spouse Schwab IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Snowflake Inc. Class A Common Stock (SNOW) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab IRA ⇒ SWVXX [BA]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ Arm Holdings plc - American Depository Shares (ARM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ AT&T Inc. (T) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Spouse Schwab Roth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Fidelity Select Utilities Growth Portfolio (FSUTX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Sprott Physical Gold Trust ETV (PHYS) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
TreasuryDirect ⇒ Series I Savings Bond [GS]		\$15,001 - \$50,000	Interest	Not Applicable	\$1,001 - \$2,500
TreasuryDirect ⇒ Series I Savings Bonds [GS]		\$15,001 - \$50,000	Interest	Not Applicable	None
DESCRIPTION: Jessica's I-Bonds (amount TBD)					

* Investment Vehicle 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 Current Year to Filing	Amount Preceding Year
Westly Foundation	spouse salary	N/A	\$110,000.00

SCHEDULE D: LIABILITIES

Owner Creditor	Date Incurred	Type	Amount of Liability
BSI Financial Services	Sept 2020	Mortgage	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2022	CALPERS & City of San Jose (former employer)	Defined benefit plan, arising from my 16 years of service with the City of San Jose.

COMMENTS: Date of agreement based on date of resignation from position with the City of San Jose.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Fidelity 457
- Schwab
LOCATION: US
- Spouse Schwab IRA (Owner: SP)
- CalPERS Pension Sam Liccardo
DESCRIPTION: Defined Benefit Pension for service at the City of San Jose; 16 years accrual
- Spouse Schwab SEP IRA (Owner: SP)
- Spouse Schwab Roth IRA (Owner: SP)
- TreasuryDirect
LOCATION: US
- Schwab ⇒ Schwab IRA -- Sam Liccardo
- Schwab ⇒ Schwab Roth IRA -- Sam Liccardo
- Schwab ⇒ Schwab Trading Account -- Sam Liccardo
- Schwab ⇒ Schwab SEP IRA -- Sam Liccardo
- Fidelity 457 ⇒ Santa Clara 457 Plan
- Fidelity 457 ⇒ BrokerageLink

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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. Sam T. Liccardo , 11/03/2025