



Filing ID #10040998

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Judy Chu
Status: Member
State/District: CA27

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2020
Filing Date: 08/7/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Apollo Medical Holdings, Inc. (AMEH) [ST]	SP	\$100,001 - \$250,000	Dividends	\$1 - \$200	<input type="checkbox"/>
California Public Employees Retirement System [DB]	Undetermined		defined benefit	\$15,001 - \$50,000	<input type="checkbox"/>
California State Teachers Retirement System [DB]	Undetermined		defined benefit	\$15,001 - \$50,000	<input type="checkbox"/>
Chu-Lim Investments LLC ⇒ Rental Property #1, 25% [RP] LOCATION: Santa Clara, CA, US		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Chu-Lim Investments LLC ⇒ Rental Property #2, 25% [RP] LOCATION: Santa Clara, CA, US		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Chu-Lim Investments LLC ⇒ Rental Property #3, 25% [RP] LOCATION: Santa Clara, CA, US		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Chu-Lim Investments LLC ⇒ Rental Property #4, 25% [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Santa Clara, CA, US					
Chu-Lim Investments LLC ⇒ Rental Property #5, 25% [RP]		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: San Jose, CA, US					
Citibank Savings Acct [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Citibank- J.M. Chu Irrevocable Trust II [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
East West Bank Certificate of Deposit [BA]	SP	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Charitable Account- Judy Chu Fund [BA]		\$100,001 - \$250,000	Interest, one-time donation of stocks	None	<input type="checkbox"/>
New Omni Bank Certificate of Deposit [BA]	SP	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
New Omni Bank Savings Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Preferred Bank Certificate of Deposit [BA]	SP	\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Savings Plus ⇒ 401K International Fund [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Large Cap Fund [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Large Cap Index Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Large Cap Socially Responsible Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Mid Cap Fund [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Short Term Investment Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
401K Short Term Investment Fund- Cash [PE]					
Savings Plus ⇒ 401K Small Cap Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 International Fund [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Large Cap Socially Responsible Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Large Cap Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Large Cap Index Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Mid Cap Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Short Term Investment Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Short Term Investment Fund- Cash [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Small Cap Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
United Pacific Bank Certificate of Deposit [BA]	SP	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Allstate Corporation (ALL) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ CA Intermediate Term Bond Tax-Exempt Mutual Fund VCADX [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Federal Money Market Account [BA]		\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Growth Index Fund Admiral Cl (VIGAX) [MF]		\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard- Eng Chu Family Trust ⇒ Mid-Cap Index Fund VIMAX [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Short Term Bond Index VBIRX [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Total International Bond Index VTABX [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard EG US Stock ETF (ESGV) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard ESG Intl Stock ETF (VSGX) [MF]		\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Extended Market Index Admiral Cl (VEXAX) [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard FTSE All World Ex US Index Admiral Class (VFWAX) [MF]		\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Intermediate Term Bond ETF (BIV) [EF]		None	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Intermediate Term Bond Index Admiral Cl (VBILX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Short Term Bond ETF (BSV) [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Total Intl Bond Index ETF (BNDX) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Total Stock Market Index Admiral Cl (VTSAX) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Windsor II Mutual Fund VWNAX [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard IRA ⇒ Total International Bond Index (VTABX) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard IRA ⇒ Vanguard Long Term Bond Index Admiral Class (VBLAX) [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Personal Investment Account ⇒ FTSE All-World Ex-US Index ex IS Admiral Cl. VFWAX [MF]	None		Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard Personal Investment Account ⇒ Total International Stock Index Admiral Cl (VTIAX) [MF]	None		Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vanguard Personal Investment Account ⇒ Vanguard EG US Stock ETF (ESGV) [EF]	None		Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard Personal Investment Account ⇒ Vanguard ESG Intl Stock ETF (VSGX) [EF]	None		Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard Personal Investment Account ⇒ Vanguard Intermediate Term Bond Index Admiral Cl (VBILX) [MF]	None		Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Vanguard Personal Investment Account ⇒ Vanguard Short Term Bond ETF (BSV) [EF]	None		Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vanguard Personal Investment Account ⇒ Vanguard Total Stock Market Index Admiral Cl. (VTSAX) [MF]	None		Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Extended Markets Stock Index VEXAX [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Federal Money Market Account [BA]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Intermediate-Term Tax Exempt (VWIUX) [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ iShares Russell 1000 Growth Index (IWF) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒	None		Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Russell 1000 Value Index (IWD) [EF]					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ iShares Russell 2000 Index (IWM) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Long-Term Tax Exempt Fund VWLUX [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ SPDR S&P MidCap 400 (MDY) [EF]	None		Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Total International Stock Index VTIAX [MF]	None		Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Dividend Appreciation Index Fund (VDADX) [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Extended Market ETF (VXF) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard FTSE All World Ex US Index Admiral Class (VFWAX) [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard FTSE Social Index Admiral Cl (VFTAX) [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard LTD Term tax-exempt Admiral Cl (VMLUX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Value ETF (VTV) [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Wells Fargo Bank Checking Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo Bank Savings Account [BA]	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	<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?
Vanguard Personal Investment Account ⇒ Allstate Corporation (ALL) [ST]		12/23/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard Personal Investment Account ⇒ Federal Money Market [BA]		04/9/2020	P	\$250,001 - \$500,000	
Vanguard Personal Investment Account ⇒ FTSE All World ex-US Index Admiral (VFWAX) [MF]		04/6/2020	P	\$100,001 - \$250,000	
Vanguard Personal Investment Account ⇒ FTSE All World ex-US Index Admiral (VFWAX) [MF]		04/9/2020	P	\$50,001 - \$100,000	
Vanguard Personal Investment Account ⇒ Total International Stock Index Admiral Cl (VTIAX) [MF]		04/6/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
Vanguard Personal Investment Account ⇒ Total Stock Market Index Admiral (VTSAX) [MF]		04/9/2020	P	\$50,001 - \$100,000	
Vanguard Personal Investment Account ⇒ Vanguard ESG Intl Stock ETF (VSGX) [MF]		04/6/2020	P	\$100,001 - \$250,000	
Vanguard Personal Investment Account ⇒ Vanguard ESG Intl Stock ETF (VSGX) [MF]		04/7/2020	P	\$50,001 - \$100,000	
Vanguard Personal Investment Account ⇒ Vanguard ESG US Stock ETF (ESGV) [MF]		04/9/2020	P	\$50,001 - \$100,000	
Vanguard Personal Investment Account ⇒ Vanguard Intermediate Term Bond Index Admiral Cl (VBILX) [MF]		04/9/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Personal Investment Account ⇒ Vanguard Short Term Bond ETF (BSV) [MF]		04/9/2020	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Federal Money Market [MF]		04/9/2020	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ iShares Russell 1000 Growth ETF (IWF) [MF]		04/7/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ iShares Russell 1000 Growth ETF (IWF) [MF]		06/4/2020	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ iShares Russell 1000 Growth ETF (IWF) [MF]		12/8/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ iShares Russell 1000 Value ETF (IWD) [MF]		04/7/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ iShares Russell 1000 Value ETF (IWD) [MF]		12/8/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ iShares Russell 2000 ETF (IWM) [MF]		04/7/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ SPDR S&P MidCap 400 (MDY) [MF]		04/7/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Dividend Appreciation Index Fund (VDADX) [MF]		04/7/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Extended Market ETF (VXF) [MF]		06/4/2020	P	\$1,001 - \$15,000	
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard FTSE All World Ex US Index Admiral Class (VFWAX) [MF]		04/6/2020	P	\$100,001 - \$250,000	
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard FTSE All World Ex US Index Admiral Class (VFWAX) [MF]		04/7/2020	S	\$50,001 -	<input type="checkbox"/>

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
Chu Irrevocable Trust II-managed ⇒ Vanguard FTSE All World Ex US Index Admiral Class (VFWAX) [MF]			(partial) \$100,000	
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Intermediate Term Tax Exempt (VWIUX) [MF]	04/7/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Limited Term Tax Exempt (VMLUX) [MF]	04/7/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Limited Term Tax Exempt (VMLUX) [MF]	12/8/2020	P	\$15,001 - \$50,000	
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Long-Term Tax Exempt (VWLUX) [MF]	04/7/2020	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Total International Stock Index Fund (VTIAX) [MF]	04/6/2020	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Value ETF (VTV) [MF]	06/4/2020	P	\$15,001 - \$50,000	

* 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

Source	Type	Amount
Apollo Medical Holdings	Spouse board attendance compensation	N/A
State of California	Spouse salary	N/A
California Public Employees Retirement System	Defined Benefit	\$23,269.40
California State Teachers Retirement System	Defined Benefit	\$33,038.79

SCHEDULE D: LIABILITIES

Owner Creditor	Date Incurred	Type	Amount of Liability
Capitol Hill Tower Housing Cooperative	May 2010	Mortgage on underlying property of personal residence, Washington DC (not rented)	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member (uncompensated)	Asian Pacific American Institute for Congressional Studies
Board Member (uncompensated)	APAICS Leadership Network

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2001	Myself and California State Teachers Retirement System	Defined pension benefit plan for teaching position in the LA Community College District
May 2001	Myself and California Public Employees Retirement System	Defined pension benefit plan for service on Monterey Park City Council

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

- Chu-Lim Investments LLC
LOCATION: US
- Savings Plus
- Vanguard- Eng Chu Family Trust
- Vanguard IRA
- Vanguard Personal Investment Account
LOCATION: US
- Vanguard-JM Chu Irrevocable Trust II
- Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed

LOCATION: US

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. Judy Chu , 08/7/2021