



Filing ID #10067551

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Mike Levin  
**Status:** Member  
**State/District:** CA49

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2023  
**Filing Date:** 05/09/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset        | Income Type(s) | Income            | Tx. > \$1,000?                      |
|--|-------|-----------------------|----------------|-------------------|-------------------------------------|
| US Bank Accounts [BA]  | JT    | \$100,001 - \$250,000 | Interest       | \$1,001 - \$2,500 | <input type="checkbox"/>            |
| Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]              | SP    | \$100,001 - \$250,000 | Tax-Deferred   |                   | <input type="checkbox"/>            |
| Fidelity IRA ⇒ Fidelity Capital and Income Fund (FAGIX) [MF]                 | SP    | \$1,001 - \$15,000    | Tax-Deferred   |                   | <input type="checkbox"/>            |
| Fidelity IRA ⇒ Fidelity Freedom 2040 (FFFFX) [MF]                            | SP    | \$250,001 - \$500,000 | Tax-Deferred   |                   | <input checked="" type="checkbox"/> |
| Fidelity IRA ⇒ Fidelity International Sustainability Index Fund (FNIDX) [MF] |       | \$50,001 - \$100,000  | Tax-Deferred   |                   | <input checked="" type="checkbox"/> |
| Fidelity IRA ⇒ Fidelity OTC Pt (FOCPX) [MF]                                  | SP    | \$100,001 - \$250,000 | Tax-Deferred   |                   | <input type="checkbox"/>            |
| Fidelity IRA ⇒ Fidelity Real Estate Income (FRIFX) [MF]                      | SP    | \$1,001 - \$15,000    | Tax-Deferred   |                   | <input type="checkbox"/>            |
| Fidelity IRA ⇒   | SP    | \$15,001 - \$50,000   | Tax-Deferred   |                   | <input type="checkbox"/>            |

| <b>Asset</b>   | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income</b> | <b>Tx. &gt; \$1,000?</b> |
|--|--------------|-----------------------|-----------------------|---------------|--------------------------|
| Fidelity Select Biotechnology Pt (FBIOX) [MF]  |              |                       |                       |               |                          |
| Fidelity IRA ⇒<br>Fidelity Select Environmental and Alternative Energy Ptf<br>(FSLEX) [MF] |              | \$100,001 - \$250,000 |                       | Tax-Deferred  | <input type="checkbox"/> |
| Fidelity IRA ⇒<br>Fidelity Sustainability Bond Index Fund (FNDSX) [MF]                     |              | \$50,001 - \$100,000  |                       | Tax-Deferred  | <input type="checkbox"/> |
| Fidelity Roth IRA ⇒<br>Fidelity Freedom 2040 (FFFFX) [MF]                                  | SP           | \$15,001 - \$50,000   |                       | Tax-Deferred  | <input type="checkbox"/> |
| Vanguard 529 #1 ⇒<br>Vanguard Aggressive Growth Portfolio [MF]                             | DC           | \$15,001 - \$50,000   |                       | Tax-Deferred  | <input type="checkbox"/> |
| Vanguard 529 #1 ⇒<br>Vanguard Growth Index Portfolio [MF]                                  | DC           | \$15,001 - \$50,000   |                       | Tax-Deferred  | <input type="checkbox"/> |
| Vanguard 529 #1 ⇒<br>Vanguard Mid-Cap Index Portfolio [MF]                                 | DC           | \$15,001 - \$50,000   |                       | Tax-Deferred  | <input type="checkbox"/> |
| Vanguard 529 #2 ⇒<br>Vanguard Aggressive Growth Portfolio [MF]                             | DC           | \$15,001 - \$50,000   |                       | Tax-Deferred  | <input type="checkbox"/> |
| Vanguard 529 #2 ⇒<br>Vanguard Growth Index Portfolio [MF]                                  | DC           | \$15,001 - \$50,000   |                       | Tax-Deferred  | <input type="checkbox"/> |
| Vanguard 529 #2 ⇒<br>Vanguard Mid-Cap Index Portfolio [MF]                                 | DC           | \$15,001 - \$50,000   |                       | Tax-Deferred  | <input type="checkbox"/> |

\* 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 B: TRANSACTIONS

| <b>Asset</b>  | <b>Owner</b> | <b>Date</b> | <b>Tx. Type</b> | <b>Amount</b>      | <b>Cap. Gains &gt; \$200?</b> |
|---|--------------|-------------|-----------------|--------------------|-------------------------------|
| Fidelity IRA ⇒<br>Fidelity International Sustainability Index Fund (FNIDX) [MF] |              | 12/15/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity IRA ⇒<br>Fidelity Freedom 2040 (FFFFX) [MF]                            | SP           | 05/12/2023  | P               | \$1,001 - \$15,000 |                               |

| <b>Asset</b>   | <b>Owner</b> | <b>Date</b> | <b>Tx. Type</b> | <b>Amount</b>      | <b>Cap. Gains &gt; \$200?</b> |
|--|--------------|-------------|-----------------|--------------------|-------------------------------|
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 01/19/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 02/03/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 02/21/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity IRA ⇒<br>Fidelity Freedom 2040 (FFFFX) [MF]               | SP           | 12/28/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 03/03/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 03/20/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 04/05/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 04/19/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 04/27/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 05/03/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 05/18/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 06/05/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 06/21/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒<br>Fidelity Freedom Blend 2040 Fund (FHARX) [MF] | SP           | 07/06/2023  | P               | \$1,001 - \$15,000 |                               |
| Fidelity 401(k) ⇒  | SP           | 07/19/2023  | P               | \$1,001 - \$15,000 |                               |

| Asset   | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------|----------|--------|---------------------|
| Fidelity Freedom Blend 2040 Fund (FHARX) [MF] |       |      |          |        |                     |

\* 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 |
|----------------|---------------|--------|
| Irvine Company | Spouse Salary | N/A    |

## SCHEDULE D: LIABILITIES

| Owner | Creditor   | Date Incurred  | Type                          | Amount of Liability     |
|-------|------------|----------------|-------------------------------|-------------------------|
| SP    | Mr. Cooper | September 2020 | Mortgage on Primary Residence | \$500,001 - \$1,000,000 |

## 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 INVESTMENT VEHICLE DETAILS

- Fidelity 401(k) (Owner: SP)
- Fidelity IRA
- Fidelity IRA (Owner: SP)
- Fidelity Roth IRA (Owner: SP)

- Vanguard 529 #1 (Owner: DC)  
LOCATION: NV
- Vanguard 529 #2 (Owner: DC)  
LOCATION: NV

## **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. Mike Levin , 05/09/2025