



Filing ID #10063259

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Derek Kilmer
Status: Former Member
State/District: WA06

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2025
Filing Date: 01/27/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America CDs [BA]		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Bank of America Checking/Savings [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Core Plus Bond Fund (BBCPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder International Equity Fund (BBIEX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Large Cap Growth Fund (BBGLX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Large Cap Value Fund (BBVLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Small/Mid Cap growth Fund (BBGSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Small/Mid Cap Value Fund (BBVSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones IRA ⇒ Capital World Bond Fund - Class F-3 (WFBFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ DFA International Small Company Portfolio (DFISX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Edward Jones Retirement Money Market [BA]		\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones IRA ⇒ Federated Hermes Institutional High Yield Bond Fund Class R6 Shares (FIHLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Financial Square Government Fund FST Shares (FGTXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Invesco International Small-Mid Company Fund Class R6 (OSCIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ JPMorgan Emerging Markets Equity Fund R6 (JEMWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ T. Rowe Price Emerging Markets Corporate Bond Fund - I Class (TECIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ TCW Emerging Markets Income Fund Plan Share (TGEPX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Growth ETF (VUG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones IRA ⇒ Vanguard Large-Cap ETF (VV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Mid-Cap ETF (VO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones Roth IRA ⇒ Capital Income Builder Cl A Shs (CAIBX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
McKinsey & Co. Money Purchase Pension Plan [PE] DESCRIPTION: Defined contribution plan. Target Retirement 2040		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
McKinsey & Co. Profit Sharing Retirement Plan [PE] DESCRIPTION: Defined contribution plan. Target Retirement 2040		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
WA State PERS Plan 2 [DB] DESCRIPTION: Defined benefit plan		Undetermined	None		<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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Edward Jones IRA ⇒ Bridge Builder Large Cap Growth Fund (BBGLX) [MF]		04/15/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Federated Hermes Institutional High Yield Bond Fund Class R6 Shares (FIHLX) [MF]		04/15/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Edward Jones IRA ⇒ Invesco International Small-Mid Company Fund Class R6 (OSCIX) [MF]		10/24/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ JPMorgan Emerging Markets Equity Fund R6 (JEMWX) [MF]		10/25/2024	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ T. Rowe Price Emerging Markets Corporate Bond Fund - I Class (TECIX) [MF]		10/24/2024	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ TCW Emerging Markets Income Fund Plan Share (TGE PX) [MF]		10/25/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		10/24/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		04/15/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		04/15/2024	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		04/15/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Growth ETF (VUG) [EF]		10/24/2024	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ Vanguard Growth ETF (VUG) [EF]		04/15/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Large-Cap ETF (VV) [EF]		10/24/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Mid-Cap ETF (VO) [EF]		10/24/2024	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ Vanguard Mid-Cap ETF (VO) [EF]		04/15/2024	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]		04/15/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?

* 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
Princeton University	Salary	\$26,989.65
Princeton University	Expense Reimbursement	\$8,000.70

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	US Bank	October 2020	Home Mortgage	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Visiting Lecturer	Princeton University

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2005	State of Washington	Public Employees Retirement System Plan 2. PERS Plan 2 is a defined benefit plan. When you meet plan requirements and retire, you are guaranteed a monthly benefit based on earned service credit and compensation while a member of PERS Plan 2.
October 1999	McKinsey and Company Profit Sharing Retirement/Pension Plan	Retirement plan managed for McKinsey and Co. by Alight. The Plan is a Defined Contribution occupational pension plan operated for the exclusive purpose of providing retirement benefits and death benefits to eligible participants and beneficiaries. I am no longer contributing to the plan. It has a retirement target date of 2040.

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?
Government of Qatar (MECEA)	05/9/2024	05/14/2024	Washington, DC - Doha, Qatar - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Edward Jones IRA
- Edward Jones Roth IRA

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. Derek Kilmer , 01/27/2025