



Filing ID #10046958

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Pramila Jayapal
Status: Member
State/District: WA07

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 05/13/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DFA Emerging Markets Core Equity [MF]	None		Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares					
DFA Tax Managed US Core 2 [MF]	None		Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Partial Sale. Remaining balance was converted to an ETF (Dimensional US Core Equity 2 ETF)					
DFA US Core 2 ETF [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: New Position. DFA Tax Managed US Core 2 Mutual Fund converted to Dimensional US Core Equity 2 ETF.					
Inspiris Credit Union [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
IRA ⇒ DFA Emerging Markets Social Core [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New position 2021.					
IRA ⇒ DFA Global Real Estate [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ DFA International Sustainability Core Equity [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA ⇒ DFA International Sustainability Core Equity [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: SEP IRA					
IRA ⇒ DFA Investment Grade Bond Fund [MF]		\$50,001 - \$100,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA ⇒ DFA One-Year Fixed [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
IRA ⇒ DFA Two-Year Global [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
IRA ⇒ DFA US Social Core Equity [MF]		\$100,001 - \$250,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA ⇒ DFA US Sustainability Core 1 Portfolio [MF]		\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: SEP IRA					
IRA ⇒ Schwab Government Money Fund [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: SEP IRA					
IRA ⇒ Schwab Money Market Fund [OT]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Money Market Fund					
IRA ⇒ Vanguard GNMA [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: SEP IRA					
IRA ⇒ Vanguard REIT Index, Admiral Shares [MF]		\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
Newell Rubbermaid Inc. (NWL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Roth IRA ⇒ DFA Emerging Markets Social Core Equity [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Roth IRA ⇒ DFA Emerging Markets Social Core Equity [MF]	SP	\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Roth IRA ⇒	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DFA International Sustainability Core [MF]					
Schwab Money Market Fund [MF]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Schwab Money Market Fund [MF]	JT	\$250,001 - \$500,000	None		<input type="checkbox"/>
DESCRIPTION: Deposit end of 2021					
Solo 401(k) ⇒ DFA Global Real Estate [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: IRA position rolled into Solo 401(k) on 5/13/2021. Excluded transaction on Schedule B.					
Solo 401(k) ⇒ DFA International Real Estate [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: IRA position rolled into Solo 401(k) on 5/13/2021. Excluded transaction on Schedule B.					
Solo 401(k) ⇒ DFA International Social Core [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: IRA position rolled into Solo 401(k) on 5/13/2021. Excluded transaction on Schedule B.					
Solo 401(k) ⇒ DFA Investment Grade Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: IRA position rolled into Solo 401(k) on 5/13/2021. Excluded transaction on Schedule B.					
Solo 401(k) ⇒ DFA One-Year Fixed [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: IRA position rolled into Solo 401(k) on 5/13/2021. Excluded transaction on Schedule B.					
Solo 401(k) ⇒ DFA US Sustainability Core 1 Portfolio [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: IRA position rolled into Solo 401(k) on 5/13/2021. Excluded transaction on Schedule B.					
Solo 401(k) ⇒ Schwab Money Market Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: IRA position rolled into Solo 401(k) on 5/13/2021. Excluded transaction on Schedule B.					
Solo 401(k) ⇒ Vanguard GNMA [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: IRA position rolled into Solo 401(k) on 5/13/2021. Excluded transaction on Schedule B.					
Sound Retirement Trust Pension [PE]	SP	Undetermined	Pension	\$5,001 - \$15,000	<input type="checkbox"/>
Teamsters Affiliates Pension [PE]	SP	Undetermined	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Teamsters Pension [PE]	SP	Undetermined	None		<input type="checkbox"/>
UFCW Pension [PE]	SP	Undetermined	Pension	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard REIT Index, Admiral Shares [MF]		None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares					

* 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?
DFA Emerging Markets Core Equity [MF]		03/10/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares					
DFA Tax Managed US Core 2 [MF]		04/26/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DFA Tax Managed US Core 2 [MF]		06/11/2021	E	\$50,001 - \$100,000	
DESCRIPTION: DFA Tax Managed US Core 2 Mutual Fund was converted to Dimensional US Core Equity 2. No gains triggered during conversion.					
Dimensional US Core Equity 2 ETF [EF]		07/15/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dimensional US Core Equity 2 ETF [EF]		08/9/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dimensional US Core Equity 2 ETF [EF]		06/11/2021	E	\$50,001 - \$100,000	
DESCRIPTION: DFA Tax Managed US Core 2 Mutual Fund was converted to Dimensional US Core Equity 2. No gains triggered during conversion.					
IRA => DFA Emerging Markets Core [MF]	SP	09/17/2021	P	\$1,001 - \$15,000	
DESCRIPTION: New position purchased in IRA and immediately converted to Roth.					
IRA => DFA Emerging Markets Social Core [MF]		04/27/2021	P	\$15,001 - \$50,000	
DESCRIPTION: Rebalancing					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA ⇒ DFA Global Real Estate [MF]		04/27/2021	P	\$15,001 - \$50,000	
DESCRIPTION: Rebalancing					
IRA ⇒ DFA Investment Grade Bond [MF]	SP	04/27/2021	P	\$1,001 - \$15,000	
IRA ⇒ DFA Investment Grade Bond [MF]		04/27/2021	P	\$15,001 - \$50,000	
DESCRIPTION: Rebalancing					
IRA ⇒ DFA US Social Core Equity [MF]		04/27/2021	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: Rebalancing					
Solo 401(k) ⇒ DFA International Sustainability Core [MF]	SP	05/20/2021	P	\$1,001 - \$15,000	
DESCRIPTION: New purchase					
Vanguard REIT Index, Admiral Shares [MF]		03/10/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard REIT Index, Admiral Shares [MF]		07/8/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard REIT Index, Admiral Shares [MF]		08/9/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: sold all shares					

* 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
Consulting Business	Spouse self-employment income	\$60,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Bank, N.A.	05/31/2017	Residential Mortgage	\$500,001 - \$1,000,000
JT	BB&T Home Mortgage	April 2018	Residential Mortgage	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Congressional Progressive Caucus Center

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 ASSET CLASS DETAILS

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

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. Pramila Jayapal , 05/13/2022