



Filing ID #10042519

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Kim Dr Schrier  
**Status:** Member  
**State/District:** WA08

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 08/11/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
David's IRA ⇒ Apple Inc. (AAPL) [ST]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
David's IRA ⇒ Federated Hermes Government Obligations Premier (GOFXX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
David's IRA ⇒ iShares Trust 3 7 Year Treasury Bond (IEI) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
David's IRA ⇒ Money Market [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
David's IRA ⇒ Tesla, Inc. (TSLA) [ST]	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
David's IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
David's IRA ⇒ Vanguard Scottsdale FDS Intermediate (VCIT) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
David's IRA ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Apple Inc. (AAPL) [ST]  DESCRIPTION: Sold some shares of AAPL.	JT	None	Capital Gains, Dividends	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Cash [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Dimensional Fund Advisors US Social Core EQTY 2 (DFUEX) [MF]	JT	\$250,001 - \$500,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Federated Hermes Government Obligations Premier (GOFXX) [MF]	JT	\$1,000,001 - \$5,000,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EM (ESGE) [EF]	JT	None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ IShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]	JT	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Schwab US REIT ETF (SCHH) [EF]	JT	None	None		<input type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]	JT	\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Vanguard ESG US Stock (ESGV) [EF]	JT	\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Gowing Family Trust Secondary Account ⇒ Apple Inc. (AAPL) [ST]	JT	None	Capital Gains, Dividends	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Gowing Family Trust Secondary Account ⇒ Cash/Money Market Acct [BA]	JT	\$500,001 - \$1,000,000	Interest	\$1 - \$200	<input type="checkbox"/>
Gowing Family Trust Secondary Account ⇒ Federated Hermes Govt Obligations Premier (GOFXX) [MF]	JT	\$1,000,001 - \$5,000,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Gowing Family Trust Secondary Account ⇒ Tesla, Inc. (TSLA) [ST]	JT	\$250,001 - \$500,000	Capital Gains	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Kim's 401(a) with VMMC ⇒ DFA International Social Core EQ Instl (DSCLX) [EF]		None		Tax-Deferred	<input checked="" type="checkbox"/>
Kim's 401(a) with VMMC ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Kim's 401(a) with VMMC ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		\$1 - \$1,000		Tax-Deferred	<input checked="" type="checkbox"/>
Kim's 401(a) with VMMC ⇒ iShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]		\$50,001 - \$100,000		Tax-Deferred	<input checked="" type="checkbox"/>
Kim's 401(a) with VMMC ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		\$250,001 - \$500,000		Tax-Deferred	<input checked="" type="checkbox"/>
Kim's 401(a) with VMMC ⇒ Vanguard ESG US Stock (ESGV) [EF]		\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
Kim's 401(a) with VMMC ⇒ Vanguard Scottsdale FDS Intermediate (VCIT) [EF]		\$1 - \$1,000		Tax-Deferred	<input checked="" type="checkbox"/>
Kim's 403b - Pre-2009 ⇒ Fidelity International Index (FSPSX) [MF]		\$100,001 - \$250,000		Tax-Deferred	<input type="checkbox"/>
Kim's 403b - Pre-2009 ⇒ Fidelity US Bond Index (FXNAX) [MF]		\$250,001 - \$500,000		Tax-Deferred	<input type="checkbox"/>
Kim's 403b with VMMC ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Kim's 403b with VMMC ⇒ Vanguard Developed Markets Index Admiral		\$50,001 - \$100,000		Tax-Deferred	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
(VTMGX) [MF]					
Kim's 403b with VMMC ⇒ VANGUARD INTERMED TRM INVST GR ADMIRAL (VFIDX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Kim's 403b with VMMC ⇒ VANGUARD MID-CAP VALUE INDEX ADMIRAL (VMMAX) [MF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Kim's Roth IRA - 2014 ⇒ DFA Emerging Markets Social Core Equity Portfolio (DFESX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Kim's Roth IRA - 2014 ⇒ DFA International Social Core Equity Portfolio Instl Class (DSCLX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Kim's Roth IRA - 2014 ⇒ ISHares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Kim's Roth IRA - 2014 ⇒ Money Market [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Kim's Roth IRA - 2014 ⇒ Schwab US REIT ETF (SCHH) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Kim's Roth IRA - 2014 ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ DFA Emerging Markets Social Core Portfolio (DFESX) [MF]		None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ Dimensional Fund Advisors US Social Core EQTY (DSCLX) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ Dimensional Fund Advisors US Social Core EQTY 2 (DFUEX) [MF]		None	None		<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ FDIC Insured Deposit Account [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Samuel Gowing Trust ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Samuel Gowing Trust ⇒ iShares ESG Aware MSCI EM (ESGE) [EF]		None	None		<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ iShares Trust ESG Aware MSCI USA Small Cap (ESML) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ SPDR Portfolio Aggregate Bond ETF (SPAB) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ TIAA-CREF Social Choice Equity Fund Institutional (TISCX) [MF]		None	None		<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ Vanguard ESG US Stock (ESGV) [EF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ Vanguard FTSE Social Index Fund Admiral (VFTAX) [MF]		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ Vanguard Real Estate ETF (VNQ) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Stanford Health Care Retirement Savings Plan ⇒ Vanguard Institutional Target Retirement 2030 (FFEGX) [IH]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo joint checking account 2018 [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Joint checking account with my spouse.					

\* 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?
David's IRA ⇒ Apple Inc. (AAPL) [ST]	SP	03/3/2020	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
David's IRA ⇒ Federated Hermes Government Obligations Premier (GOFXX) [MF]	SP	03/19/2020	P	\$500,001 - \$1,000,000	
David's IRA ⇒ Federated Hermes Government Obligations Premier (GOFXX) [MF]	SP	11/12/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
David's IRA ⇒ Federated Hermes Government Obligations Premier (GOFXX) [MF]	SP	12/11/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
David's IRA ⇒ iShares Trust 3 7 Year Treasury Bond (IEI) [EF]	SP	11/12/2020	P	\$15,001 - \$50,000	
David's IRA ⇒ iShares Trust 3 7 Year Treasury Bond (IEI) [EF]	SP	12/11/2020	P	\$100,001 - \$250,000	
David's IRA ⇒ Tesla, Inc. (TSLA) [ST]	SP	03/3/2020	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
David's IRA ⇒ Vanguard Real Estate ETF (VNR) [EF]	SP	11/12/2020	P	\$50,001 - \$100,000	
David's IRA ⇒ Vanguard Scottsdale FDS Intermediate (VCIT) [EF]	SP	11/12/2020	P	\$15,001 - \$50,000	
David's IRA ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	SP	12/11/2020	P	\$15,001 - \$50,000	
David's IRA ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	SP	11/12/2020	P	\$1,001 - \$15,000	
Gowing Family Trust Primary Account ⇒ Apple Inc. (AAPL) [ST]	JT	01/29/2020	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Apple Inc. (AAPL) [ST]	JT	02/28/2020	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Apple Inc. (AAPL) [ST]	JT	03/2/2020	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Gowing Family Trust Primary Account ⇒ Apple Inc. (AAPL) [ST]	JT	03/3/2020	S	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Charles Schwab US REIT ETF (SCHH) [EF]	JT	03/19/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Dimensional Fund Advisors US Social Core EQTY 2 (DFUEX) [EF]	JT	12/11/2020	P	\$100,001 - \$250,000	
Gowing Family Trust Primary Account ⇒ Dimensional Fund Advisors US Social Core EQTY 2 (DFUEX) [EF]	JT	11/11/2020	P	\$250,001 - \$500,000	
Gowing Family Trust Primary Account ⇒ Federated Hermes Government Obligations Premier (GOFXX) [MF]	JT	11/18/2020	P	\$1,000,001 - \$5,000,000	
Gowing Family Trust Primary Account ⇒ Federated Hermes Government Obligations Premier (GOFXX) [MF]	JT	03/10/2020	P	\$1,000,001 - \$5,000,000	
Gowing Family Trust Primary Account ⇒ Federated Hermes Government Obligations Premier (GOFXX) [MF]	JT	12/11/2020	S	\$500,001 - \$1,000,000	<input type="checkbox"/>
Gowing Family Trust Primary Account ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	JT	02/3/2020	P	\$50,001 - \$100,000	
Gowing Family Trust Primary Account ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]	JT	06/25/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]	JT	03/6/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EM (ESGE) [EF]	JT	04/6/2020	P	\$1,001 - \$15,000	
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EM (ESGE) [EF]	JT	04/13/2020	P	\$1,001 - \$15,000	
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EM (ESGE) [EF]	JT	04/20/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EM (ESGE) [EF]	JT	06/25/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EM (ESGE) [EF]	JT	11/11/2020	P	\$1,000,001 - \$5,000,000	
Gowing Family Trust Primary Account ⇒ IShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]	JT	06/25/2020	P	\$15,001 - \$50,000	
Gowing Family Trust Primary Account ⇒ IShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]	JT	11/11/2020	P	\$250,001 - \$500,000	
Gowing Family Trust Primary Account ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]	JT	11/11/2020	P	\$500,001 - \$1,000,000	
Gowing Family Trust Primary Account ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]	JT	12/11/2020	P	\$250,001 - \$500,000	
Gowing Family Trust Primary Account ⇒ Vanguard ESG US Stock (ESGV) [EF]	JT	12/14/2020	P	\$250,001 - \$500,000	
Gowing Family Trust Primary Account ⇒ Vanguard ESG US Stock (ESGV) [EF]	JT	03/19/2020	P	\$100,001 - \$250,000	
Gowing Family Trust Primary Account ⇒ Vanguard ESG US Stock (ESGV) [EF]	JT	03/6/2020	P	\$15,001 - \$50,000	
Gowing Family Trust Primary Account ⇒ Vanguard ESG US Stock (ESGV) [EF]	JT	12/11/2020	P	\$50,001 - \$100,000	
Gowing Family Trust Primary Account ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	12/11/2020	P	\$50,001 - \$100,000	
Gowing Family Trust Primary Account ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	06/25/2020	P	\$50,001 - \$100,000	
Gowing Family Trust Primary Account ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	03/19/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	JT	12/28/2020	P	\$1,001 - \$15,000	
Gowing Family Trust Primary Account ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	JT	12/11/2020	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Gowing Family Trust Primary Account ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	JT	09/18/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Gowing Family Trust Primary Account ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	JT	06/25/2020	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Gowing Family Trust Secondary Account ⇒ Apple Inc. (AAPL) [ST]	JT	02/28/2020	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
Gowing Family Trust Secondary Account ⇒ Apple Inc. (AAPL) [ST]	JT	03/2/2020	S	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
Gowing Family Trust Secondary Account ⇒ Apple Inc. (AAPL) [ST]	JT	03/3/2020	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
Gowing Family Trust Secondary Account ⇒ Tesla, Inc. (TSLA) [ST]	JT	03/3/2020	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Kim's 401(a) with VMMC ⇒ DFA International Social Core EQ Instl (DSCLX) [EF]		06/25/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
Kim's 401(a) with VMMC ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		03/6/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
Kim's 401(a) with VMMC ⇒ ISHARES TR ESG AWARE MSCI [EF]		06/26/2020	P	\$50,001 - \$100,000	
Kim's 401(a) with VMMC ⇒ VANGUARD DEVELOPED MRKTS INDEX ADMIRAL (VTMGX) [MF]		06/26/2020	P	\$50,001 - \$100,000	
Kim's 401(a) with VMMC ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		06/25/2020	P	\$100,001 - \$250,000	
Kim's 401(a) with VMMC ⇒ VANGUARD INTERMED TRM INVST GR ADMIRAL (VFIDX) [MF]		06/25/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
Kim's 401(a) with VMMC ⇒ VANGUARD MID-CAP VALUE INDEX ADMIRAL (VMMAX) [MF]		06/25/2020	P	\$100,001 - \$250,000	
Kim's 401(a) with VMMC ⇒ Vanguard Scottsdale FDS Intermediate (VCIT) [EF]		03/6/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Kim's 401(a) with VMMC ⇒ VANGUARD WORLD FD ESG US STK ETF [EF]		03/6/2020	P	\$100,001 - \$250,000	
Kim's 401(a) with VMMC ⇒ VANGUARD WORLD FD ESG US STK ETF [EF]		06/25/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
Kim's 403b with VMMC ⇒ Vanguard Developed Markets Index Admiral (VTMGX) [MF]		06/26/2020	P	\$50,001 - \$100,000	
Kim's 403b with VMMC ⇒ VANGUARD INTERMED TRM INVST GR ADMIRAL (VFIDX) [MF]		06/25/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
Kim's 403b with VMMC ⇒ VANGUARD MID-CAP VALUE INDEX ADMIRAL (VMMAX) [MF]		06/25/2020	P	\$100,001 - \$250,000	
Kim's Roth IRA - 2014 ⇒ Charles Schwab US REIT ETF (SCHH) [EF]		11/11/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Kim's Roth IRA - 2014 ⇒ DFA Emerging Markets Social Core Equity Portfolio (DFESX) [EF]		06/25/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Kim's Roth IRA - 2014 ⇒ Dimensional Fund Advisors US Social Core EQTY (DSCLX) [EF]		06/25/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
Kim's Roth IRA - 2014 ⇒ iShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]		06/26/2020	P	\$15,001 - \$50,000	
Kim's Roth IRA - 2014 ⇒ iShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]		11/11/2020	P	\$1,001 - \$15,000	
Kim's Roth IRA - 2014 ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		07/14/2020	P	\$1,001 - \$15,000	
Kim's Roth IRA - 2014 ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		06/25/2020	P	\$15,001 - \$50,000	
Samuel Gowing Trust ⇒ DFA Emerging Markets Social Core Equity Portfolio (DFESX) [MF]		03/19/2020	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Samuel Gowing Trust ⇒ DFA Emerging Markets Social Core Equity Portfolio (DFESX) [MF]		06/16/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ Dimensional Fund Advisors US Social Core EQTY (DSCLX) [MF]		03/19/2020	P	\$15,001 - \$50,000	
Samuel Gowing Trust ⇒ Dimensional Fund Advisors US Social Core EQTY 2 (DFUEX) [MF]		03/19/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Samuel Gowing Trust ⇒ iShares ESG Aware MSCI EM (ESGE) [EF]		03/19/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Samuel Gowing Trust ⇒ iShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]		03/19/2020	P	\$15,001 - \$50,000	
Samuel Gowing Trust ⇒ SPDR Series Trust Portfolio AGRGTE (SPAB) [EF]		03/6/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Samuel Gowing Trust ⇒ TIAA-CREF Social Choice Equity Fund Institutional (TISCX) [MF]		03/19/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Samuel Gowing Trust ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		06/16/2020	P	\$1,001 - \$15,000	
Samuel Gowing Trust ⇒ Vanguard ESG INTL STK ETF (VSGX) [MF]		03/19/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Samuel Gowing Trust ⇒ Vanguard ESG US Stock (ESGV) [EF]		04/6/2020	P	\$1,001 - \$15,000	
Samuel Gowing Trust ⇒ Vanguard ESG US Stock (ESGV) [EF]		03/6/2020	P	\$1,001 - \$15,000	
Samuel Gowing Trust ⇒ Vanguard ESG US Stock (ESGV) [EF]		06/16/2020	P	\$1,001 - \$15,000	
Samuel Gowing Trust ⇒ Vanguard ESG US Stock (ESGV) [EF]		03/19/2020	P	\$15,001 - \$50,000	
Samuel Gowing Trust ⇒ Vanguard FTSE Social Index Admiral (VFTAX) [MF]		03/19/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>

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

\* 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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Well Fargo Bank	2012	Home mortgage	\$100,001 - \$250,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2017	Kim Schrier and Virginia Mason Medical Center	Ongoing leave of absence.

## 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

- David's IRA (Owner: SP)
- Gowing Family Trust Primary Account (Owner: JT)  
DESCRIPTION: Kimberly Schrier Gowing and David Noble Gowing Trustees
- Gowing Family Trust Secondary Account (Owner: JT)
- Kim's 401(a) with VMMC

- Kim's 403b - Pre-2009
- Kim's 403b with VMMC
- Kim's Roth IRA - 2014
- Samuel Gowing Trust  
DESCRIPTION: Trust for son's education
- Stanford Health Care Retirement Savings Plan (Owner: JT)  
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. Kim Dr Schrier , 08/11/2021