



Filing ID #10052764

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Raul Ruiz
Status: Member
State/District: CA25

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 05/18/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Eisenhower Medical Center Retirement Plan [PE]	SP	Undetermined	Tax-Deferred		<input type="checkbox"/>
My Savings Direct [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Personal Bank of America Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
ScholarShare 529 Plan #1 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
ScholarShare 529 Plan #2 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ Alerian MLP ETF (AMLP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ American Income Fund of America Class F2 (AMEFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ Doubleline Funds TR Total Return Bond Fund CL I (DBLTX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Summit Wealth Management - IRA ⇒ Exchange Traded Concepts Trust ROBO Global Robotics and Automation Index ETF (ROBO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ First Trust NASDAQ Technology Dividend Index Fund (TDIV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ First Trust Water ETF (FIW) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ Global X Lithium & Battery Tech ETF (LIT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ Invesco BuyBack Achievers ETF (PKW) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ Invesco KBW Premium Yield Equity REIT ETF (KBWY) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ iShares 0-5 Year TIPS Bond ETF (STIP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares Core High Dividend ETF (HDV) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares North American Natural Resources ETF (IGE) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ iShares Trust iShares U.S. Transportation ETF (IYT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Summit Wealth Management - IRA ⇒ iShares U.S. Industrials ETF (IYJ) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares U.S. Medical Devices ETF (IHI) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ Multi-Asset Diversified Income Index Fund (MDIV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ PGIM Floating Rate Income CL Z (FRFZX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ SPDR Bloomberg Convertible Securities ETF (CWB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ VanEck Merk Gold Trust (OUNZ) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ Vanguard Financials ETF (VFH) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ Vanguard Health Care ETF (VHT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ Vanguard Information Tech ETF (VGT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ Vanguard Mega Cap ETF (MGC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Summit Wealth Management - IRA ⇒ Wells Fargo Bank, N.A. [IH]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
UC Retirement Savings Plan ⇒ UC Savings Fund (Bond Fund) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
US Acute Care Solutions Profit Sharing/401(k) Plan and Trust ⇒ FID FDM IDX 2035 IPR (FIHFX) [MF]		\$100,001 - \$250,000	Tax-Deferred		<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?
ScholarShare 529 Plan #1 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	12/20/2022	P	\$1,001 - \$15,000	
ScholarShare 529 Plan #1 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	07/8/2022	P	\$1,001 - \$15,000	
ScholarShare 529 Plan #1 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	05/20/2022	P	\$1,001 - \$15,000	
ScholarShare 529 Plan #1 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	02/22/2022	P	\$1,001 - \$15,000	
ScholarShare 529 Plan #1 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	01/4/2022	P	\$1,001 - \$15,000	
ScholarShare 529 Plan #2 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	02/22/2022	P	\$1,001 - \$15,000	
ScholarShare 529 Plan #2 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	05/20/2022	P	\$1,001 - \$15,000	
ScholarShare 529 Plan #2 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	07/8/2022	P	\$1,001 - \$15,000	
ScholarShare 529 Plan #2 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	12/20/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
ScholarShare 529 Plan #2 ⇒ 2032/2033 Enrollment Portfolio Passive [MF]	DC	01/4/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Alerian MLP ETF (AMLP) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Alerian MLP ETF (AMLP) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ American Income Fund of America Class F2 (AMEFX) [MF]		12/30/2022	P	\$15,001 - \$50,000	
Summit Wealth Management - IRA ⇒ Blackrock FDS II Mutli-Asset Income Port Instl (BIICX) [MF]		12/30/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Blackrock FDS II Mutli-Asset Income Port Instl (BIICX) [MF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Blackrock FDS II Mutli-Asset Income Port Instl (BIICX) [MF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Columbia Funds TR IX Strategic Income Fund Class Instl (LSIZX) [MF]		04/27/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Purchase transaction less than \$1,000					
Summit Wealth Management - IRA ⇒ Doubleline Funds TR Total Return Bond Fund CL I (DBLTX) [MF]		12/30/2022	P	\$15,001 - \$50,000	
Summit Wealth Management - IRA ⇒ First Trust Cloud Computing ETF (SKYY) [EF]		10/14/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]		09/1/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ First Trust NASDAQ Technology Dividend Index Fund (TDIV) [EF]		01/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒		02/9/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
First Trust NASDAQ Technology Dividend Index Fund (TDIV) [EF]					
Summit Wealth Management - IRA ⇒ First Trust NASDAQ Technology Dividend Index Fund (TDIV) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ First Trust NASDAQ Technology Dividend Index Fund (TDIV) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ First Trust NASDAQ Technology Dividend Index Fund (TDIV) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Global X Lithium & Battery Tech ETF (LIT) [EF]		01/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]		01/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]		02/9/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Invesco S&P 500 Equal Weight Financial ETF (RYF) [EF]		10/14/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ iShares 0-5 Year TIPS Bond ETF (STIP) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares 0-5 Year TIPS Bond ETF (STIP) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares Core High Dividend ETF (HDV) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares Core High Dividend ETF (HDV) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒		03/31/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares Core High Dividend ETF (HDV) [EF]					
Summit Wealth Management - IRA ⇒ iShares Core High Dividend ETF (HDV) [EF]		07/29/2022	P	\$15,001 - \$50,000	
Summit Wealth Management - IRA ⇒ iShares Core High Dividend ETF (HDV) [EF]		11/29/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		01/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		02/9/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		11/29/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares Residential and Multisector Real Estate ETF (REZ) [EF]		09/1/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares Residential and Multisector Real Estate ETF (REZ) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares Residential and Multisector Real Estate ETF (REZ) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares Semiconductor ETF (SOXX) [EF]		09/1/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ iShares TIPS Bond ETF (TIP) [EF]		06/13/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Summit Wealth Management - IRA ⇒ iShares TIPS Bond ETF (TIP) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares TIPS Bond ETF (TIP) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares TIPS Bond ETF (TIP) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares U.S. Broker-Dealers & Securities Exchanges ETF (IAI) [EF]		10/14/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ iShares U.S. Home Construction ETF (ITB) [EF]		07/27/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ iShares U.S. Industrials ETF (IYJ) [EF]		01/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares U.S. Industrials ETF (IYJ) [EF]		02/9/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares U.S. Industrials ETF (IYJ) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares U.S. Industrials ETF (IYJ) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares U.S. Industrials ETF (IYJ) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares U.S. Industrials ETF (IYJ) [EF]		11/29/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares U.S. Medical Devices ETF (IHI) [EF]		01/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares U.S. Medical Devices ETF (IHI) [EF]		02/9/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Summit Wealth Management - IRA ⇒ iShares U.S. Medical Devices ETF (IHI) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares U.S. Medical Devices ETF (IHI) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares U.S. Medical Devices ETF (IHI) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ iShares U.S. Medical Devices ETF (IHI) [EF]		11/29/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Materials Select Sector SPDR (XLB) [EF] DESCRIPTION: Purchase transactions less than \$1,000		09/1/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Multi-Asset Diversified Income Index Fund (MDIV) [EF]		02/9/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ PGIM Floating Rate Income CL Z (FRFZX) [MF]		02/9/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ PGIM Floating Rate Income CL Z (FRFZX) [MF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ PGIM Floating Rate Income CL Z (FRFZX) [MF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Pimco FDS Income FD Instl CL (PIMIX) [MF]		12/15/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Pimco FDS Income FD Instl CL (PIMIX) [MF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Pimco FDS Income FD Instl CL (PIMIX) [MF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]		12/30/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Bloomberg Convertible Securities ETF (CWB) [EF]		02/9/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Summit Wealth Management - IRA ⇒ SPDR Bloomberg Convertible Securities ETF (CWB) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Bloomberg Convertible Securities ETF (CWB) [EF]		06/13/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ SPDR FTSE International Government Inflation-Protected Bond ETF (WIP) [EF]		08/17/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Purchase less than \$1,000					
Summit Wealth Management - IRA ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]		06/13/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Purchase transactions less than \$1,000					
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		12/30/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		09/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		11/29/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		01/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		02/9/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		03/24/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		11/29/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		09/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ SPDR Series Trust SPDR Homebuilders ETF (XHB) [EF] DESCRIPTION: Purchase less than \$1,000		09/1/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		10/14/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		12/30/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Financials ETF (VFH) [EF]		01/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Health Care ETF (VHT) [EF]		01/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Health Care ETF (VHT) [EF]		02/9/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Health Care ETF (VHT) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Health Care ETF (VHT) [EF]		03/24/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Summit Wealth Management - IRA ⇒ Vanguard Health Care ETF (VHT) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Information Tech ETF (VGT) [EF]		01/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Information Tech ETF (VGT) [EF]		02/9/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Information Tech ETF (VGT) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Information Tech ETF (VGT) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Information Tech ETF (VGT) [EF]		03/31/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Mega Cap ETF (MGC) [EF]		01/12/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Mega Cap ETF (MGC) [EF]		02/9/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Mega Cap ETF (MGC) [EF]		03/15/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Mega Cap ETF (MGC) [EF]		03/24/2022	P	\$1,001 - \$15,000	
Summit Wealth Management - IRA ⇒ Vanguard Mega Cap ETF (MGC) [EF]		03/31/2022	P	\$1,001 - \$15,000	

* 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
Innecare	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Founder	Future Physician Leaders

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2014	University of California Riverside School of Medicine	Leave of absence without pay for Dr. Raul Ruiz, Senior Associate Dean for Community Partnership & Engagement, and Health Services Clinical Professor. Originally effective January 1, 2015 - December 31, 2016; extended through December 31, 2024.

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?
U.S. Association of Former Members of Congress (FMC)	05/28/2022	06/4/2022	Palm Springs, CA - Tokyo, Japan - Kyoto, Japan - Los Angeles, LA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
The Council for Global Equity	05/5/2022	05/6/2022	San Diego, CA - Tijuana, Mexico - San Diego, CA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Equis Institute	12/10/2022	12/12/2022	Washington, DC - Mexico City, Mexico - 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 ASSET CLASS DETAILS

<ul style="list-style-type: none">ScholarShare 529 Plan #1 (Owner: DC) LOCATION: CAScholarShare 529 Plan #2 (Owner: DC) LOCATION: CASummit Wealth Management - IRAUC Retirement Savings Plan

- US Acute Care Solutions Profit Sharing/401(k) Plan and Trust

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. Raul Ruiz , 05/18/2023