



Filing ID #10062609

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Chrissy Houlahan
Status: Member
State/District: PA06

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2023
Filing Date: 08/16/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank Accounts ⇒ Ardent Credit Union [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank Accounts ⇒ Wells Fargo [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Discovery Growth Fund [MF]	JT	\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Discovery Value Fund [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Emerging Markets Portfolio [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Small Cap Core Portfolio [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [GS]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ iShares Core MSCI Total International Stock ETF (IXUS) [EF]	JT	None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Barton W Houlahan IRA Rollover ⇒ AllianceBernstein All Market R Class [MF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Growth Fund [MF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Value Fund [MF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Emerging Markets Portfolio [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Intl Strategic Equities [MF]	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Small Cap Core Portfolio [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustain Global Theme [MF]	SP	\$250,001 - \$500,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
BNY Employee Stock Ownership Plan [PE]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Spouse Pension Fund from first job 30 years ago					
Christina J Houlahan IRA 13743 ⇒ AB All Market Class [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Christina J Houlahan Trust 50974 ⇒ Bernstein Diversified Municipal Portfolio [GS]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Green Century Balanced Fund Institutional Class (GCBUX) [MF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Spouse Retirement account from last job					

* 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?
Bart and Christina Houlahan 03694 ⇒ AB Discovery Growth Fund, Inc. - Advisor Class (CHCYX) [MF]	JT	08/28/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB International Strategic Equities Portfolio - ADV (STEYX) [MF]	JT	01/9/2023	P	\$15,001 - \$50,000	
Bart and Christina Houlahan 03694 ⇒ AB International Strategic Equities Portfolio - ADV (STEYX) [MF]	JT	12/11/2023	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB International Strategic Equities Portfolio - ADV (STEYX) [MF]	JT	04/17/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB International Strategic Equities Portfolio - ADV (STEYX) [MF]	JT	08/28/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Small Cap Core Portfolio - ADV (SCRYX) [MF]	JT	12/8/2023	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Small Cap Core Portfolio - ADV (SCRYX) [MF]	JT	08/28/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Sustainable Global Thematic Fund - ADV (ATEYX) [MF]	JT	03/30/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Bart and Christina Houlahan 03694 ⇒ AB Sustainable Global Thematic Fund - ADV (ATEYX) [MF]	JT	03/30/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Sustainable Global Thematic Fund - ADV (ATEYX) [MF]	JT	04/10/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Trust - AB Discovery Value Fund - Advisor Class (ABYSX) [MF]	JT	01/18/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Trust - AB Discovery Value Fund - Advisor Class (ABYSX) [MF]	JT	08/28/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ iShares Core MSCI Total International Stock ETF (IXUS) [EF]	JT	01/9/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Sanford C. Bernstein Diversified Municipal Pt (SNDPX) [MF]	JT	03/30/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Sanford C. Bernstein Diversified Municipal Pt (SNDPX) [MF]	JT	04/10/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Sanford C. Bernstein Fd, Inc. - Tax-Aware Overlay A Port - Cl 1 Shs (SATOX) [MF]	JT	03/30/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Sanford C. Bernstein Fd, Inc. - Tax-Aware Overlay A Port - Cl 1 Shs (SATOX) [MF]	JT	04/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Sanford C. Bernstein Fd, Inc. - Tax-Aware Overlay B Port - Cl 1 Shs (SBTOX) [MF]	JT	03/30/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Sanford C. Bernstein Fd, Inc. - Tax-Aware Overlay B Port - Cl 1 Shs (SBTOX) [MF]	JT	04/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Barton W Houlahan IRA Rollover ⇒ AB Bond Fund, Inc. - AB All Market Real Return Portfolio - Class 1 (AMTOX) [MF]	SP	12/6/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Barton W Houlahan IRA Rollover ⇒ The AB Portfolios - AB Wealth Appreciation Strategy - Advisor Class (AWAYX) [MF]	SP	12/13/2023	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Small Cap Core Portfolio - ADV (SCRYX) [MF]	SP	12/8/2023	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustainable Global Thematic Fund - ADV (ATEYX) [MF]	SP	12/7/2023	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Trust - AB Discovery Value Fund - Advisor Class (ABYSX) [MF]	SP	12/11/2023	P	\$1,001 - \$15,000	
Christina J Houlahan IRA 13743 ⇒ AB Bond Fund, Inc. - AB All Market Real Return Portfolio - Class 1 (AMTOX) [MF]		12/6/2023	P	\$1,001 - \$15,000	
Christina J Houlahan IRA 13743 ⇒ The AB Portfolios - AB Wealth Appreciation Strategy - Advisor Class (AWAYX) [MF]		12/13/2023	P	\$1,001 - \$15,000	

* 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
Irrational Capital	Spouse Salary	\$78,048.00
Tandem Care, Inc.	Spouse Salary	\$57,532.87
B Lab Company, Inc.	Spouse Salary	\$128,667.67
Beautiful Business, LLC	Spouse Salary	\$5,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Ardent Credit Union	September 2020	Mortgage of Primary Residence	\$500,001 - \$1,000,000
JT	Ardent Credit Union	September 2022	Mortgage on Second Home	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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?
Former Members of Congress: The Congressional Study Groups	02/18/2023	02/25/2023	Philadelphia, PA - Tokyo, Japan - Hiroshima, Japan - Philadelphia, PA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Climate Solutions Foundation	12/7/2023	12/11/2023	Washington D.C. - Dubai, UAE - Washington D.C.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">Bank Accounts (Owner: JT) LOCATION: USBart and Christina Houlahan 03694 (Owner: JT) LOCATION: USBarton W Houlahan IRA Rollover (Owner: SP) DESCRIPTION: IRABarton W. Houlahan Irrevocable Trust 33482 (Owner: SP)Christina J Houlahan IRA 13743Christina J Houlahan Trust 50974
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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. Chrissy Houlahan , 08/16/2024