



Filing ID #10048955

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 08/7/2022

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 | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Bank Accounts ⇒ Wells Fargo [BA] | JT | \$1 - \$1,000 | None | | <input type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ AB Discovery Growth Fund [MF] | JT | \$50,001 - \$100,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ AB Discovery Value Fund [MF] | JT | \$50,001 - \$100,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ AB Emerging Markets Portfolio [MF] | JT | \$15,001 - \$50,000 | Capital Gains, Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF] | JT | \$250,001 - \$500,000 | Capital Gains, Dividends | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ AB Small Cap Core Portfolio [MF] | JT | \$15,001 - \$50,000 | Capital Gains, Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF] | JT | \$250,001 - \$500,000 | Capital Gains, Dividends | \$15,001 - \$50,000 | <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 | \$250,001 - \$500,000 | Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF] | JT | \$100,001 - \$250,000 | Dividends, Interest | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF] | JT | \$100,001 - \$250,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF] | SP | \$100,001 - \$250,000 | Capital Gains, Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Barton W Houlahan IRA Rollover ⇒ AllianceBernstein All Market R Class [MF] | SP | \$15,001 - \$50,000 | Capital Gains, Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Growth Fund [MF] | SP | \$15,001 - \$50,000 | Capital Gains, Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Value Fund [MF] | SP | \$15,001 - \$50,000 | Capital Gains, Dividends | \$2,501 - \$5,000 | <input 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 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Small Cap Core Portfolio [MF] | SP | \$15,001 - \$50,000 | Capital Gains, Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustain Global Theme [MF] | SP | \$500,001 - \$1,000,000 | Capital Gains | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Christina J Houlahan IRA 13743 ⇒ AB All Market Class [MF] | | \$15,001 - \$50,000 | Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF] | | \$100,001 - \$250,000 | Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Christina J Houlahan Trust 50974 ⇒ Bernstein Diversified Municipal Portfolio [GS] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <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? |
|---|-------|------------|----------|---------------------|-------------------------------------|
| Bart and Christina Houlahan 03694 ⇒ AB Discovery Growth Fund [MF] | JT | 12/9/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ AB Discovery Growth Fund [MF] | JT | 12/9/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ AB Emerging Markets Portfolio [MF] | JT | 12/8/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF] | JT | 12/10/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF] | JT | 12/10/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF] | JT | 12/10/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF] | JT | 12/16/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF] | JT | 04/19/2021 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF] | JT | 07/20/2021 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF] | JT | 10/25/2021 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF] | JT | 05/20/2021 | S | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF] | JT | 07/30/2021 | S | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF] | JT | 07/30/2021 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|----------|---------------------|-------------------------------------|
| Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF] | JT | 07/30/2021 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [MF] | JT | 12/10/2021 | P | \$15,001 - \$50,000 | |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF] | JT | 12/15/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF] | JT | 12/15/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF] | JT | 12/15/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF] | JT | 07/30/2021 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF] | JT | 07/30/2021 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF] | JT | 07/30/2021 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF] | JT | 07/30/2021 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF] | JT | 12/15/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF] | JT | 12/15/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF] | JT | 12/15/2021 | P | \$1,001 - \$15,000 | |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF] | JT | 07/30/2021 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Bart and Christina Houlahan 03694 ⇒ | JT | 07/30/2021 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|----------|---------------------|-------------------------------------|
| Tax Aware Overlay B [MF] | | | | | |
| Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF] | JT | 07/30/2021 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Barton W Houlahan IRA Rollover ⇒ AB All Market Class [MF] | SP | 12/8/2021 | P | \$1,001 - \$15,000 | |
| Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF] | SP | 12/15/2021 | P | \$1,001 - \$15,000 | |
| Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF] | SP | 12/15/2021 | P | \$1,001 - \$15,000 | |
| Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF] | SP | 12/15/2021 | P | \$1,001 - \$15,000 | |
| Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Growth Fund [MF] | SP | 12/9/2021 | P | \$1,001 - \$15,000 | |
| Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Value Fund [MF] | SP | 12/13/2021 | P | \$1,001 - \$15,000 | |
| Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Intl Strategic Equities [MF] | SP | 12/10/2021 | P | \$1,001 - \$15,000 | |
| Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Intl Strategic Equities [MF] | SP | 12/13/2021 | P | \$1,001 - \$15,000 | |
| Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Small Cap Core Portfolio [MF] | SP | 12/10/2021 | P | \$1,001 - \$15,000 | |
| Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustain Global Theme [MF] | SP | 12/9/2021 | P | \$15,001 - \$50,000 | |
| Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustain Global Theme [MF] | SP | 10/25/2021 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Christina J Houlahan IRA 13743 ⇒ AB All Market Class [MF] | | 12/8/2021 | P | \$1,001 - \$15,000 | |
| Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF] | | 12/15/2021 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------|--------------------|---------------------|
| Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF] | | 12/15/2021 | P | \$1,001 - \$15,000 | |
| Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF] | | 12/15/2021 | 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 |
|--------|---------------|--------------|
| B Lab | Spouse Salary | \$208,082.00 |

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 |

SCHEDULE E: POSITIONS

None disclosed.

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

- Bank Accounts (Owner: JT)

LOCATION: US

- Bart and Christina Houlahan 03694 (Owner: JT)
LOCATION: US
- Barton W Houlahan IRA Rollover (Owner: SP)
DESCRIPTION: IRA
- Barton W. Houlahan Irrevocable Trust 33482 (Owner: SP)
- Christina J Houlahan IRA 13743
- Christina J Houlahan Trust 50974

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 , 08/7/2022