



Filing ID #10072768

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Sam T. Liccardo
Status: Member
State/District: CA16

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2024
Filing Date: 11/03/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|---------------------------|-------------------------|-------------------------------|-----------------------|
| American Express Savings [BA] | | \$15,001 - \$50,000 | Interest | Not Applicable | \$2,501 - \$5,000 |
| Residential Property [RP] | JT | \$1,000,001 - \$5,000,000 | Rent | \$50,001 - \$100,000 | \$50,001 - \$100,000 |
| LOCATION: Imperial Beach / San Diego County, CA, US | | | | | |
| Vacation Property [RP] | | \$1,000,001 - \$5,000,000 | Rent | None | \$15,001 - \$50,000 |
| LOCATION: Tahoe City/ Placer County, CA, US | | | | | |
| DESCRIPTION: Condominium owned by four siblings, and sold in November of 2024. | | | | | |
| CalPERS Pension Sam Liccardo ⇒ CalPERS [DB] | | \$250,001 - \$500,000 | Capital Gains, Interest | Not Applicable | None |
| Fidelity 457 ⇒ BrokerageLink ⇒ Fidelity Global Innovators Class Series A U\$ DSC (FNLIX) [MF] | | \$100,001 - \$250,000 | Tax-Deferred | | |
| Fidelity 457 ⇒ BrokerageLink ⇒ Fidelity Select Utilities Growth Portfolio (FSUTX) [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | |

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| Fidelity 457 ⇒ BrokerageLink ⇒ Vanguard S&P 500 ETF (VOO) [EF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ 92210J135 MISSIONSQ PLUS R13 [OT] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: residual Mutual Fund -- primarily treasuries | | | | | |
| Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX) [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ Vanguard FTSE All-World ex-US Index Fund Insti Shs (VFWSX) [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ American States Water Company Common Stock (AWR) [ST] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Bank of America CD (6/2025) [BA] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Bristol-Myers Squibb Company Common Stock (BMY) [ST] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Citibank (6/2025) [BA] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: Certificate of Deposit, Maturity June of 2025 | | | | | |
| Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ FHLB (3/2030) [GS] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: Fixed coupon bond w/ maturity of March 2030. | | | | | |
| Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ FHLB (9/2026) [GS] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| DESCRIPTION: Fixed coupon bond, maturity date September 2026. | | | | | |
| Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF] | | \$100,001 - \$250,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ | | \$50,001 - | Tax-Deferred | | |

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| Schwab Prime Advantage Fund [BA] | | \$100,000 | | | |
| DESCRIPTION: Money market fund. | | | | | |
| Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF] | | \$100,001 - \$250,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ SOFI (2024) [BA] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: Certificate of Deposit, Maturity in 2024. | | | | | |
| Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ SWVXX [BA] | | \$100,001 - \$250,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Invesco Water Resources ETF (PHO) [EF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Merck & Company, Inc. Common Stock (MRK) [ST] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ NovoCure Limited - Ordinary Shares (NVCR) [ST] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Vanguard S&P 500 ETF (VOO) [EF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Schwab ⇒ Schwab SEP IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| | | | | | |

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| Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF] | | \$15,001 - \$50,000 | Interest | Not Applicable | \$201 - \$1,000 |
| Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF] | | \$15,001 - \$50,000 | Capital Gains, Dividends | Not Applicable | \$1,001 - \$2,500 |
| Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ SWVXX [BA] | | \$1,001 - \$15,000 | Interest | Not Applicable | \$1 - \$200 |
| Spouse Schwab IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| Spouse Schwab IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| Spouse Schwab IRA ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF] | SP | \$50,001 - \$100,000 | Tax-Deferred | | |
| Spouse Schwab IRA ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF] | SP | \$50,001 - \$100,000 | Tax-Deferred | | |
| Spouse Schwab IRA ⇒ Snowflake Inc. Class A Common Stock (SNOW) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| Spouse Schwab IRA ⇒ SWVXX [BA] | SP | \$50,001 - \$100,000 | Tax-Deferred | | |
| Spouse Schwab Roth IRA ⇒ Arm Holdings plc - American Depositary Shares (ARM) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| Spouse Schwab Roth IRA ⇒ AT&T Inc. (T) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| Spouse Schwab Roth IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | |
| Spouse Schwab Roth IRA ⇒ Netflix, Inc. - Common Stock (NFLX) [ST] | SP | \$15,001 - \$50,000 | Tax-Deferred | | |

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| Spouse Schwab Roth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| Spouse Schwab Roth IRA ⇒ Verizon Communications Inc. Common Stock (VZ) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| Spouse Schwab SEP IRA ⇒ Fidelity Select Utilities Growth Portfolio (FSUTX) [MF] | SP | \$1 - \$1,000 | Tax-Deferred | | |
| Spouse Schwab SEP IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| Spouse Schwab SEP IRA ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | |
| Spouse Schwab SEP IRA ⇒ Sprott Physical Gold Trust ETV (PHYS) [EF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| TreasuryDirect ⇒ Series I Savings Bond [GS] | | \$15,001 - \$50,000 | Interest | Not Applicable | \$1,001 - \$2,500 |
| TreasuryDirect ⇒ Series I Savings Bonds [GS] | | \$15,001 - \$50,000 | Interest | Not Applicable | None |
| DESCRIPTION: Jessica's I-Bonds (amount TBD) | | | | | |

* 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 Current Year to Filing | Amount Preceding Year |
|-------------------|---------------|-------------------------------------|--------------------------|
| Westly Foundation | spouse salary | N/A | \$110,000.00 |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|------------------------|---------------|----------|-----------------------|
| | BSI Financial Services | Sept 2020 | Mortgage | \$250,001 - \$500,000 |

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|---|--|--|
| December 2022 | CALPERS & City of San Jose (former employer) | Defined benefit plan, arising from my 16 years of service with the City of San Jose. |
| COMMENTS: Date of agreement based on date of resignation from position with the City of San Jose. | | |

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

| |
|---|
| <ul style="list-style-type: none">◦ Fidelity 457◦ Schwab LOCATION: US◦ Spouse Schwab IRA (Owner: SP)◦ CalPERS Pension Sam Liccardo DESCRIPTION: Defined Benefit Pension for service at the City of San Jose; 16 years accrual◦ Spouse Schwab SEP IRA (Owner: SP)◦ Spouse Schwab Roth IRA (Owner: SP)◦ TreasuryDirect LOCATION: US◦ Schwab ⇒ Schwab IRA -- Sam Liccardo◦ Schwab ⇒ Schwab Roth IRA -- Sam Liccardo◦ Schwab ⇒ Schwab Trading Account -- Sam Liccardo◦ Schwab ⇒ Schwab SEP IRA -- Sam Liccardo◦ Fidelity 457 ⇒ Santa Clara 457 Plan◦ Fidelity 457 ⇒ BrokerageLink |
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EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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. Sam T. Liccardo , 11/03/2025