



Filing ID #10062630

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Ruben Gallego
Status: Member
State/District: AZ03

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2022
Filing Date: 08/13/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Aspiration Checking Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Aspiration Fund Adviser LLC [PS]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Investment Advisory Services; Location: Marina Del Rey, CA.					
Chase Bank Checking Account [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
IRA Club ⇒ NameCoach Inc. [CS]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Convertible Note. Pronunciation Guide Services; Location: Palo Alto, CA.					
National Association of Realtors 401K ⇒ T Rowe Price Retirement 2055 Fund (TRRNX) [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
National Association of Realtors Pension Plan [DB]	SP	Undetermined	None		<input type="checkbox"/>
Rental of Real Property [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Phoenix, AZ, US					
DESCRIPTION: Member rented his primary residence for a total of \$19,802.05					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
UBS Simple IRA ⇒ JP Morgan Smart Retirement Fund 2055 (JFFCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
United Services Auto Association Checking Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>

* 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?
Aspiration Redwood Fund [MF]		07/24/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Aspiration Redwood Fund [MF]		01/30/2022	P	\$1,001 - \$15,000	
Aspiration Redwood Fund [MF]		01/11/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
NameCoach, Inc. [CS]		06/14/2022	P	\$15,001 - \$50,000	
DESCRIPTION: Convertible Note. Pronunciation Guide Services; Location: Palo Alto, CA.					

* 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
National Association of Realtors	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	USAA	June 2021	Personal Loan	\$10,000 - \$15,000
	American Express	June 2021	Revolving Credit Account	\$15,001 - \$50,000
	Citicard	June 2021	Revolving Credit Account	\$15,001 - \$50,000
JT	United Wholesale Mortgage	September 2021	Home Mortgage	\$500,001 - \$1,000,000

JT	Newrez	August 2022	Home Mortgage	\$500,001 - \$1,000,000
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SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
March 2019	Spouse and National Association of Realtors	Pension that will provide benefit upon retirement.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Aspen Institute (Aspen Strategy Group)	07/20/2022	07/21/2022	Washington DC - Aspen - 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 INVESTMENT VEHICLE DETAILS

- IRA Club
- National Association of Realtors 401K (Owner: SP)
- UBS Simple IRA (Owner: SP)

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. Ruben Gallego , 08/13/2024