



Filing ID #10036422

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Pramila Jayapal  
**Status:** Member  
**State/District:** WA07

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2019  
**Filing Date:** 07/13/2020

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DFA Emerging Markets Core Equity [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
DFA Tax Managed US Core 2 [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DFA Tax Managed US Market Wide Value [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
DFA Tax Managed US Targeted Value [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Inspirus Credit Union [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
IRA ⇒ DFA Global Real Estate [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New purchase in 2019					
IRA ⇒ DFA Global Real Estate [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DFA International Real Estate [MF]					
IRA ⇒ DFA International Social Core [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New purchase in 2019.					
IRA ⇒ DFA International Sustainability Core Equity [MF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New purchase in 2019.					
IRA ⇒ DFA Investment Grade Bond Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA One-Year Fixed [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA One-Year Fixed [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA Two-Year Global [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA US Social Core Equity [MF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New Purchase in 2019					
IRA ⇒ DFA US Sustainability Core 1 Portfolio [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New Purchase in 2019					
IRA ⇒ DFA US Sustainability Core 1 Portfolio [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New Purchase in 2019					
IRA ⇒ Schwab Government Money Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Schwab Money Market Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Schwab Money Market Fund [OT]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Money Market Fund					
IRA ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard GNMA [MF]					
IRA ⇒ Vanguard GNMA [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: SEP IRA					
IRA ⇒ Vanguard REIT Index, Admiral Shares [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Admiral Share was swapped for prior share class of same mutual fund.					
Newell Rubbermaid Inc. (NWL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Roth IRA ⇒ DFA Emerging Markets Social Core Equity [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ DFA Emerging Markets Social Core Equity [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ DFA International Sustainability Core [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New purchase in 2019.					
Schwab Money Market Fund [MF]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Sound Retirement Trust Pension [PE]	SP	Undetermined	Pension	\$5,001 - \$15,000	<input type="checkbox"/>
Teamsters Affiliates Pension [PE]	SP	Undetermined	None		<input type="checkbox"/>
Teamsters Pension [PE]	SP	Undetermined	None		<input type="checkbox"/>
UFCW Pension [PE]	SP	Undetermined	Pension	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard REIT Index [MF]		None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Swapped this fund for the Admiral Share class (lower cost) of the same mutual fund.					
Vanguard REIT Index, Admiral Shares [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: The previously held share class was swapped for this Admiral Share Class of the same mutual fund.					

\* 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?
DFA Tax Managed US Targeted Value [MF]		12/12/2019	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Partial MF sale.					
IRA ⇒ DFA Emerging Markets Core Equity [MF]		04/16/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Sale of mutual fund					
IRA ⇒ DFA Emerging Markets Core Equity Portfolio [MF]	SP	04/16/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sale of Mutual Fund					
IRA ⇒ DFA Emerging Markets Small Cap Portfolio [MF]	SP	04/16/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Sale of Mutual Fund					
IRA ⇒ DFA Global Real Estate [MF]	SP	02/14/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Mutual Fund Purchase.					
IRA ⇒ DFA International Core Equity [MF]		02/14/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Mutual Fund Purchase					
IRA ⇒ DFA International Core Equity [MF]		04/16/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sale of mutual fund					
IRA ⇒ DFA International Core Equity Portfolio [MF]	SP	04/16/2019	S	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: Sale of Mutual Fund					
IRA ⇒ DFA International Small Cap Value [MF]	SP	04/16/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sale of Mutual Fund					
IRA ⇒ DFA International Small Company Portfolio [MF]		04/16/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sale of mutual fund					
IRA ⇒ DFA International Social Core Equity Portfolio [MF]	SP	04/17/2019	P	\$100,001 - \$250,000	
DESCRIPTION: Mutual Fund Purchase					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA ⇒ DFA International Sustainability Core [MF]		04/17/2019	P	\$100,001 - \$250,000	<input type="checkbox"/>
DESCRIPTION: Mutual Fund Purchase					
IRA ⇒ DFA International Sustainability Core [MF]		06/27/2019	P	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Dividend Reinvestment					
IRA ⇒ DFA International Value [MF]	SP	04/16/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sale of Mutual Fund					
IRA ⇒ DFA International Value [MF]		04/16/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Mutual Fund Sale					
IRA ⇒ DFA Tax Advantaged US Core Equity 2 [MF]	SP	04/16/2019	S	\$100,001 - \$250,000	<input type="checkbox"/>
DESCRIPTION: Sale of Mutual Fund					
IRA ⇒ DFA US Core Equity 2 Portfolio [MF]		04/16/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sale of mutual fund					
IRA ⇒ DFA US Large Cap Value [MF]		04/16/2019	S	\$100,001 - \$250,000	<input type="checkbox"/>
DESCRIPTION: Sale of mutual fund					
IRA ⇒ DFA US Small Cap [MF]		04/16/2019	S	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: Sale of mutual fund					
IRA ⇒ DFA US Small Cap Value [MF]	SP	04/16/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sale of Mutual Fund					
IRA ⇒ DFA US Small Cap Value [MF]		04/16/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sale of mutual fund					
IRA ⇒ DFA US Social Core Equity 2 Portfolio [MF]		04/17/2019	P	\$100,001 - \$250,000	<input type="checkbox"/>
DESCRIPTION: Mutual Fund Purchase					

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
IRA ⇒ DFA US Sustainability Core 1 Portfolio [MF]	SP	04/17/2019	P	\$100,001 - \$250,000	
IRA ⇒ DFA US Sustainability Core 1 Portfolio [MF]		04/17/2019	P	\$15,001 - \$50,000	
DESCRIPTION: Mutual Fund Purchase					
IRA ⇒ Vanguard REIT Index [MF]		07/29/2019	E	\$50,001 - \$100,000	
DESCRIPTION: Direct Swap of Vanguard Admiral share class for non-Admiral share.					
IRA ⇒ Vanguard REIT Index, Admiral Shares [MF]		07/29/2019	E	\$50,001 - \$100,000	
DESCRIPTION: Direct Swap of Vanguard Admiral share class for non-Admiral share.					
Roth IRA ⇒ DFA Emerging Markets Social Core [MF]		04/16/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Mutual fund purchase.					
Roth IRA ⇒ DFA International Sustainability Core [MF]	SP	04/16/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Mutual fund purchase.					
Vanguard REIT Index [MF]		07/26/2019	E	\$15,001 - \$50,000	
DESCRIPTION: Direct Swap of Admiral Share class for non-Admiral share class for same mutual fund.					
Vanguard REIT Index, Admiral Shares [MF]		07/26/2019	E	\$15,001 - \$50,000	
DESCRIPTION: Direct Swap of Admiral Share class for non-Admiral share class for same mutual fund.					

\* 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

<b>Source</b>	<b>Type</b>	<b>Amount</b>
Spouse - Consulting Business Clients	Spouse Self-Employment	\$58,494.75

## SCHEDULE D: LIABILITIES

<b>Owner Creditor</b>		<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
JT	Wells Fargo Bank, N.A.	05/31/2017	Residential Mortgage	\$500,001 - \$1,000,000
JT	BB&T Home Mortgage	April 2018	Residential Mortgage	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Creative Advisory Board Member	Hedgebrook
Board Member	Congressional Progressive Caucus Center

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

<b>Source</b>	<b>Trip Details</b>				<b>Inclusions</b>		
	<b>Start Date</b>	<b>End Date</b>	<b>Itinerary</b>	<b>Days at Own Exp.</b>	<b>Lodging?</b>	<b>Food?</b>	<b>Family?</b>
Lawyer's Committee for Civil Rights	01/30/2019	02/2/2019	Washington, DC - San Francisco - Seattle	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- IRA
- IRA (Owner: SP)
- Roth IRA
- Roth 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. Pramila Jayapal , 07/13/2020