



Filing ID #10052820

# 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:** 2022  
**Filing Date:** 05/13/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Boeing Credit Union [BA]	JT	\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>
DFA International Core Equity Market ETF [EF]	JT	None	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares.					
DFA US Core 2 ETF [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: New position 2022.					
DFA US Core 2 ETF [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Inspirus Credit Union [BA]	JT	None	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Formerly "Inspirus Credit Union"					
IRA ⇒ DFA Emerging Core Equity ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New position 2022.					
IRA ⇒ DFA Emerging Markets Social Core Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA ⇒ DFA Global Real Estate [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA International Sustainability Core Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: SEP IRA					
IRA ⇒ DFA International Sustainability Core Equity [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA Investment Grade Bond Fund [MF]		\$50,001 - \$100,000	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]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA US Social Core Equity [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ DFA US Sustainability Core 1 Portfolio [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: SEP IRA					
IRA ⇒ Schwab Government Money Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: SEP IRA					
IRA ⇒ Schwab Money Market Fund [OT]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Money Market Fund					
IRA ⇒ Vanguard GNMA [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: SEP IRA					
IRA ⇒ Vanguard REIT Index, Admiral Shares [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Newell Rubbermaid Inc. (NWL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Roth IRA ⇒ DFA Emerging Core Equity ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New position 2022.					
Roth IRA ⇒ DFA Emerging Markets Core Equity [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<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 Equity [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Solo 401(k) ⇒ Avantis Real Estate ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New position 2022.					
Solo 401(k) ⇒ DFA Emerging Core Equity ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New position 2022.					
Solo 401(k) ⇒ DFA Global Real Estate [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Solo 401(k) ⇒ DFA International Core Equity Market ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: New position 2022.					
Solo 401(k) ⇒ DFA International Real Estate [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Solo 401(k) ⇒ DFA International Social Core [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Solo 401(k) ⇒ DFA International Sustainability Core Equity [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Solo 401(k) ⇒ DFA Investment Grade Bond Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Solo 401(k) ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
DFA One-Year Fixed [MF]					<input type="checkbox"/>
Solo 401(k) ⇒ DFA US Sustainability Core 1 Portfolio [MF]	SP	\$100,001 - \$250,000		Tax-Deferred	<input type="checkbox"/>
Solo 401(k) ⇒ Schwab Money Market Fund [OT]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Money Market Fund					
Solo 401(k) ⇒ Vanguard GNMA [MF]	SP	\$15,001 - \$50,000		Tax-Deferred	<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"/>

\* 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

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Avantis Real Estate ETF [EF]	JT	02/24/2022	P	\$1,001 - \$15,000	
DESCRIPTION: New purchase					
Avantis Real Estate ETF [EF]	JT	03/24/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Avantis Real Estate ETF [EF]	JT	07/15/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Sold all shares					
DFA International Core Equity Market ETF [EF]	JT	02/24/2022	P	\$50,001 - \$100,000	
DESCRIPTION: New purchase					
DFA International Core Equity Market ETF [EF]	JT	07/15/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
(partial)					
DFA International Core Equity Market ETF [EF]	JT	09/13/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
DFA International Core Equity Market ETF [EF]	JT	10/4/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sold all shares					
DFA US Core 2 ETF [EF]	JT	02/24/2022	P	\$50,001 - \$100,000	
DESCRIPTION: New purchase					
DFA US Core 2 ETF [EF]	JT	05/6/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
DFA US Core 2 ETF [EF]	JT	10/4/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DFA US Core 2 ETF [EF]		04/8/2022	S (partial)	\$544.70	<input checked="" type="checkbox"/>
DESCRIPTION: Transaction less than \$1000, but capital gains over \$200					
DFA US Core 2 ETF [EF]		07/8/2022	S (partial)	\$382.27	<input checked="" type="checkbox"/>
DESCRIPTION: Transaction less than \$1000, but capital gains over \$200					
DFA US Core 2 ETF [EF]		10/11/2022	S (partial)	\$456.10	<input checked="" type="checkbox"/>
DESCRIPTION: Transaction less than \$1000, but capital gains over \$200					
IRA ⇒ DFA Emerging Core Equity ETF [EF]		03/16/2022	P	\$1,001 - \$15,000	
DESCRIPTION: New purchase					
Roth IRA ⇒ DFA Emerging Core Equity ETF [EF]	SP	02/15/2022	P	\$1,001 - \$15,000	
DESCRIPTION: New position purchased in Roth.					
Solo 401(k) ⇒ Avantis Real Estate ETF [EF]	SP	02/24/2022	P	\$15,001 - \$50,000	
DESCRIPTION: New purchase					
Solo 401(k) ⇒ Avantis Real Estate ETF [EF]	SP	03/16/2022	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Solo 401(k) ⇒ DFA Emerging Core Equity ETF [EF]	SP	03/16/2022	P	\$1,001 - \$15,000	
DESCRIPTION: New purchase					
Solo 401(k) ⇒ DFA International Core Equity Market ETF [EF]	SP	03/16/2022	P	\$15,001 - \$50,000	
DESCRIPTION: New purchase					
Solo 401(k) ⇒ DFA Investment Grade Bond Fund [MF]	SP	02/24/2022	P	\$15,001 - \$50,000	
Solo 401(k) ⇒ DFA Investment Grade Bond Fund [MF]	SP	03/16/2022	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**

<b>Source</b>	<b>Type</b>	<b>Amount</b>
Consulting Business	Spouse self-employment income	\$64,000.00

### **SCHEDULE D: LIABILITIES**

<b>Owner</b>	<b>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	Truist Home Mortgage	April 2018	Residential Mortgage	\$250,001 - \$500,000
JT	Alan Preston, Seattle, WA	October 2022	Bridge Loan	\$1,000,001 - \$5,000,000

### **SCHEDULE E: POSITIONS**

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

### **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**

- IRA
- Roth IRA
- Roth IRA (Owner: SP)
- Solo 401(k) (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 , 05/13/2023