



Filing ID #10037561

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Andy Kim
Status: Member
State/District: NJ03

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
AXA Brightlife Grow Series 155 Core Russell 2000 1yr. [WU]		\$1,001 - \$15,000	None	<input type="checkbox"/>
AXA Brightlife Grow Series 155 Core S&P 500 1yr. [WU]		\$1,001 - \$15,000	None	<input type="checkbox"/>
AXA Brightlife Grow Series 155 Guaranteed Interest [WU]		\$1,001 - \$15,000	None	<input type="checkbox"/>
AXA Brightlife Grow Series Core S&P 500 3yr. [WU]		\$1,001 - \$15,000	None	<input type="checkbox"/>
AXA Structured Capital Strategies 16B NASDAQ 100 1yr. 10% Buffer [OT] DESCRIPTION: Variable Annuity		\$15,001 - \$50,000	None	<input type="checkbox"/>
AXA Structured Capital Strategies 16B Russell 2000 5yr. Annual Lock 10% Buffer [OT] DESCRIPTION: Variable Annuity		\$1,001 - \$15,000	None	<input type="checkbox"/>
AXA Structured Capital Strategies 16B S&P 500 1yr. 10% Buffer [OT] DESCRIPTION: Variable Annuity		\$15,001 - \$50,000	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
AXA Structured Capital Strategies 16B S&P 500 5yr. Annual Lock 10% Buffer [OT] DESCRIPTION: Variable Annuity		\$15,001 - \$50,000	None	<input type="checkbox"/>
Bank of America Checking [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200 <input type="checkbox"/>
Bank of America Savings [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>
Merrill Edge 529 ⇒ College Savings Plan - ME Blackrock o-7 Years Direct [OT] DESCRIPTION: College Savings Plan		\$50,001 - \$100,000	None	<input type="checkbox"/>
T.Rowe Price 401K ⇒ T.Rowe Price 401K [MF] DESCRIPTION: Spouse 401K	SP	\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
T.RowePrice 401k ⇒ Retirement 2045 Fund [MF] DESCRIPTION: Spouse 401k Retirement		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
Vanguard ⇒ Vanguard [MF] DESCRIPTION: Spouse Retirement	SP	\$15,001 - \$50,000	Tax-Deferred	<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

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Vanguard Group	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Chase Mortgage	July 2015	mortgage	\$531,000.00
JT	US Bank	March 2019	Mortgage	\$299,000.00

Owner	Creditor	Date Incurred	Type	Amount of Liability
-------	----------	---------------	------	---------------------

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

- Merrill Edge 529
LOCATION: DC
- T.Rowe Price 401K (Owner: SP)
DESCRIPTION: Spouse Retirement
- T.RowePrice 401k
- Vanguard (Owner: SP)
DESCRIPTION: Spouse Retirement

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. Andy Kim , 08/13/2020