



Filing ID #10037011

# FINANCIAL DISCLOSURE REPORT

---

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

---

## FILER INFORMATION

**Name:** Hon. Gerald E. Connolly  
**Status:** Member  
**State/District:** VA11

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2019  
**Filing Date:** 07/31/2020

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cigna Corporation (CI) [ST]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Congressional Federal Credit Union [BA]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fairfax County Retirement Fund Employee Plan BG - not self-directed [DB]		\$15,001 - \$50,000	Mandatory Distribution	\$15,001 - \$50,000	<input type="checkbox"/>
Leidos Holdings, Inc. (LDOS) [ST]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Merrill Lynch IRA ⇒ BANK OF AMERICA, NA RASP [PE]	SP	None	Tax-Deferred		<input type="checkbox"/>
Met Life Insurance Policy Cash Value [WU]	SP	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
Met Life Insurance Policy Cash Value [WU]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Met Life Insurance Policy Cash Value [WU]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SCIENCE APPLICATIONS INTERNATIONAL CORPORATION (SAIC) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Suntrust [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Suntrust Money Market - Federated Virginia Municipal Cash TR SS [BA]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Suntrust Mutual Fund - American Tax Exempt FD of Virginia CL C [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
TIAA CREF - Self ⇒ CREF Equity Index [PE]		None	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Self ⇒ CREF Global Equities [PE]		None	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Self ⇒ CREF Growth [PE]		None	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Self ⇒ CREF Stock [PE]		None	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Self ⇒ TIAA Cref Traditional Retirement [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Self ⇒ Vang Inst Tg Rtm 15 Inst [PE]		None	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Spouse ⇒ CREF Bond Market [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Spouse ⇒ CREF Equity Index [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Spouse ⇒ CREF Money Market [PE]	SP	None	Tax-Deferred		<input type="checkbox"/>
TIAA CREF - Spouse ⇒ CREF Social Choice [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Self ⇒ LEIDOS Closed Stock Fund [PE]		None	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA IRA - Self ⇒ LEIDOS Common Stock Fund [PE]		None	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Self ⇒ TIAA Cash Accounts [PE]		\$1,000,001 - \$5,000,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Self ⇒ Vanguard Inflation Protected Securities SEP [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Self ⇒ Vanguard Target 2015 Tr Sel [PE]		None	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Self ⇒ Vanguard Total Bond Mkt Index Inst Retirement Fund [PE]		None	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ AMERICAN FUNDS - CAPITAL WORLD GROWTH & INCOME FUND [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ AMERICAN FUNDS CAPITAL WORLD GROWTH & INCOME FUND [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ BLACKROCK GLOBAL ALLOCATION FD INC [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ CALAMOS GROWTH FUND [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ EATON VANCE FLT-RT INC INCOME TRUST [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ HOTCHKIS & WILEY LARGE CAP VALUE FUND [PE]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ iShares Core S&P Small-Cap LCap 600 Index Fund [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ TIAA Cash Accounts [PE]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ Vanguard REIT ETF [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA Joint ⇒ Bristol-Myers Squibb Company (BMY) [ST]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
TIAA Joint ⇒ Coca-Cola Company (KO) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
TIAA Joint ⇒ Dominion Energy, Inc. (D) [ST]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Eversource Energy (ES) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
TIAA Joint ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
TIAA Joint ⇒ Procter & Gamble Company (PG) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
TIAA Joint ⇒ TIAA Cash Deposit Accounts [MF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
TIAA Joint ⇒ Walt Disney Company (DIS) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
TIAA Joint ⇒ Wells Fargo Utilities and High Income Fund (ERH) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Zimmer Biomet Holdings, Inc. (ZBH) [ST]	JT	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
United Bank [BA]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: Money Market					
United Bank [BA]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: CDs					
US Senate Federal Credit Union IRA Account [IH]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
US Senate Federal Credit Union Savings Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo & Company (WFC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Cigna Corporation (CI) [ST]		12/18/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Dominion Energy, Inc. (D) [ST]	JT	03/20/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Automatic dividend reinvestment					
Dominion Energy, Inc. (D) [ST]	JT	06/26/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Automatic dividend reinvestment					
Dominion Energy, Inc. (D) [ST]	JT	09/25/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Automatic Dividend Reinvestment					
Wells Fargo Utilities and High Income Fund (ERH) [ST]		12/10/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Capital Gain Reinvested					

\* 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

Source	Type	Amount
Long and Foster Tysons	Spouse Commissions	N/A
USPJ 12Z INC	Spouse Commissions	N/A
Fairfax County Retirement Fund	Required Defined Benefit Distribution	\$17,055.60

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America	Spring 2006	Mortgage on Primary Residence	\$100,001 - \$250,000
	Nelnet	2010	Student Loan	\$10,000 - \$15,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Nelnet	2011	Student Loan	\$15,001 - \$50,000
	Nelnet	2012	Student Loan	\$15,001 - \$50,000

**SCHEDULE E: POSITIONS**

None disclosed.

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
1995	Fairfax County Retirement Fund Employee Plan B	Defined benefit plan managed entirely by the county

**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**

<ul style="list-style-type: none"><li>○ Merrill Lynch IRA (Owner: SP)</li><li>○ TIAA CREF - Self</li><li>○ TIAA CREF - Spouse (Owner: SP)</li><li>○ TIAA IRA - Self</li><li>○ TIAA IRA - Spouse (Owner: SP)</li><li>○ TIAA Joint (Owner: JT)</li></ul>
--

**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. Gerald E. Connolly , 07/31/2020