



Filing ID #10054898

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Lou Correa  
**Status:** Member  
**State/District:** CA46

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 05/24/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
457(b) OBRA-PST Plan-Nation [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
CBRE Clarion Securities [PE]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Chase Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Citibank Bank Accounts [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
County of Orange 401(a) Plan-Nationwide Fixed Acct. County of Orange State Value Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
County of Orange 457 Defined Contribution Plan [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Hotchkis and Wiley Mid-Cap Value [PE]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Interest Income Fund-SCPMG Retirement Plan Trust [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Jose Luis Correa Separate Property Trust [RP]		\$250,001 -	Rent	\$15,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Anaheim, CA, US DESCRIPTION: 1. Residential Property - Anaheim 3. 1115		\$500,000		\$50,000	<input type="checkbox"/>
Jose Luis Correa Separate Property Trust [RP]  LOCATION: Anaheim, CA, US DESCRIPTION: 2. Anaheim residential property 2. 236		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Jose Luis Correa Separate Property Trust [RP]  LOCATION: Anaheim, CA, US DESCRIPTION: 3. Anaheim Residential property 1 230		\$250,001 - \$500,000	None		<input type="checkbox"/>
Northern Trust TIPS Index Fund; Non-lending Tier [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Orange County Employees Retirement System Defined Benefit Plan [PE]		Undetermined	Tax-Deferred		<input type="checkbox"/>
Pacific Premier [BA]		\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Robeco Boston Partners Small/Mid-Cap Value Fund [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Saving Plus House Large Cap Fund- Calif. State Employees [PE]  DESCRIPTION: Target Date Fund 2020 457(b) Plan Savings Plus California State Employpass 401(k) and 457 Plans		\$1,001 - \$15,000	None		<input type="checkbox"/>
Savings House Plus Funds Large Cap Fund-Calif. State Employees [PE]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds Bond Fund-Cal State Employees [PE]  DESCRIPTION: Target Date Fund 2020 457(b) Plan Savings Plus California State Employpass 401(k) and 457 Plans		\$15,001 - \$50,000	None		<input type="checkbox"/>
Savings Plus House Funds Bond Index Fund-Cal State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds International Fund -Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings plus House Funds International Index Fund-Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Savings Plus House Funds Mid Cap Fund- Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds Mid Cap Index Fund-Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds Short Term Investment Fund Cash -Calif. State Employees [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds Short Term Investment Fund-Calif. State Employees [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus house Funds Small Cap Fund-Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds Small Cap Index Fund - Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House FundsLarge Cap Index Fund- Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
COMMENTS: Target Date Fund 2020 457 (b) Plan Savings Plus California State Employee 401(K) and 457 Plans					
Savings Plus Large Cap Index Fund-Calif. State Employees Savings Plus House Funds [PE]		\$500,001 - \$1,000,000	Tax-Deferred		<input type="checkbox"/>
SCPMG (So.Cal.Permanente Medical Group [DB]	JT	Undetermined	None		<input type="checkbox"/>
The Correa Reynoso Family Trust - Real property [RP]		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: San Diego, CA, US DESCRIPTION: Real Property 3. 1676					
The Correa Reynoso Family Trust - Real Property [RP]		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Santa Ana, CA, US DESCRIPTION: Real Property 2. 2836					
The Correa-Reynoso Family Trust - Real Propety [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Anaheim, CA, US DESCRIPTION: Real Property 1. 242					
UC Savings Fund [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Instl Stk Mkt Idx 1 [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Int'l Growth Adm [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Target Retiret Trust Plus 2 [PE]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: SCPMG Keogh Plan					
Wellington Diversified Inflation Hedges [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Bank Accounts [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>

\* 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
Southern California Permanente Group	Spouse Salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Orange County Credit Union	May, 2021	Car purchase loan	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2006	County of Orange, J. Luis Correa	Implied agreement to continue to be part of County of Orange Pension & 401(k) & 457.
November 2014	State of California, and J. Luis Correa	Implied agreement to continue to be part of state of California

Pension 401(k) and & 457.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Aspen Institute	08/29/2022	09/2/2022	Los Angeles - Reykjavk, Iceland - Los Angeles	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Center Forward	07/5/2022	07/9/2022	Los Angeles - Mexico City, Mexico - Los Angeles	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
U.S. Israel Education Association	04/29/2022	05/8/2022	Washington, DC - Tel Aviv, Israel - Los Angeles	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

None disclosed.

## 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. Lou Correa , 05/24/2023