



Filing ID #10061606

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Maxine Dexter  
**Status:** Congressional Candidate  
**State/District:** OR03

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 08/10/2024  
**Period Covered:** 01/01/2023– 07/14/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
KaiPerm CD [BA]	JT	\$15,001 - \$50,000	None		
KaiPerm Checking [BA]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
KaiPerm MM [BA]	JT	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
KaiPerm Savings [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Life Insurance (Maxine) [WU]		\$1,000,001 - \$5,000,000	None		
Life Insurance (Rob) [WU]		\$1,000,001 - \$5,000,000	None		
Maxine's NWP 401K ⇒ Fidelity Balanced Fund Class K (FBAKX) [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
Maxine's NWP 401K ⇒ Fidelity Diversified International K6 Fund (FKIDX) [MF]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Maxine's NWP 401K ⇒ Fidelity Diversified International K6 Fund (FKIDX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Maxine's NWP 401K ⇒ Vanguard Index Trust Mid-Cap Index Fund Institutional Shares (VMCIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Maxine's NWP 401K ⇒ Vanguard Index Trust Small-Cap Index Fund Instl Shares (VSCIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Maxine's NWP 401K ⇒ Vanguard Intermediate-Term Bond Index Fund Institutional Shares (VBIMX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Maxine's NWP 401K ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares (VSMPX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
MFS (OR) Alex ⇒ 1008 - COLLEGE ENROLLMENT 2024 FUND CL A [5F]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
LOCATION: OR					
MFS (OR) Alex ⇒ COLLEGE ENROLLMENT 2022 FUND CL A [5F]		\$50,001 - \$100,000	None		
LOCATION: OR					
Northwest Permanente Pension [DB]		Undetermined	None		
Northwest Permanente Pension [DB]	SP	Undetermined	None		
OnPoint CU [BA]	JT	\$1,001 - \$15,000	None		
Oregon Savings Growth Plan ⇒ BlackRock LifePath Index 2035 Fund - Investor P Shares (LIJPX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Primary Home [RP]	JT	\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Portland / Multnomah, OR, US					
DESCRIPTION: ADU rental is in the home - rented all 12 months					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rob's NWP 401K ⇒ Fidelity Balanced Fund Class K (FBAKX) [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
Rob's NWP 401K ⇒ Fidelity Diversified International K6 Fund (FKIDX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Rob's NWP 401K ⇒ Vanguard Index Trust Mid-Cap Index Fund Institutional Shares (VMCIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Rob's NWP 401K ⇒ Vanguard Index Trust Small-Cap Index Fund Instl Shares (VSCIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Rob's NWP 401K ⇒ Vanguard Intermediate-Term Bond Index Fund Institutional Shares (VBIMX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Rob's NWP 401K ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares (VSMPX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		
Rob's Wells Fargo IRA ⇒ Rob WF IRA [IH]	SP	\$100,001 - \$250,000	Tax-Deferred		
Scholars Choice (CO) Alex ⇒ Alex Scholars Choice [5F]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
LOCATION: CO					
Wells Fargo [BA]	JT	\$1,001 - \$15,000	None		
Wells Fargo Brokerage ⇒ American Funds EuroPacific Growth A (AEPGX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo Brokerage ⇒ American Funds Investment Co of America A (AIVSX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo Brokerage ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Wells Fargo IRA ⇒ WFCS CUSTODIAN TRAD IRA [IH]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
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\* Investment vehicle 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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	OnPoint CU	May 2014	Primary home	\$500,001 - \$1,000,000
JT	OnPoint CU	November 2023	Rav4	\$15,001 - \$50,000
JT	Mr. Cooper	Mar 2012	Govy cabin	\$100,001 - \$250,000
JT	OnPoint CU	May 2014	Primary home	\$500,001 - \$1,000,000
JT	OnPoint CU	November 2023	Rav4	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- Maxine's NWP 401K
- MFS (OR) Alex  
LOCATION: OR
- Oregon Savings Growth Plan
- Rob's NWP 401K (Owner: SP)
- Rob's Wells Fargo IRA (Owner: SP)
- Scholars Choice (CO) Alex  
LOCATION: CO

- Wells Fargo Brokerage (Owner: JT)  
DESCRIPTION: Straight brokerage account (mutual fund)
- Wells Fargo IRA

## **EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**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:** Maxine Dexter , 08/10/2024