



Filing ID #10050775

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Peter A. DeFazio  
**Status:** Former Member  
**State/District:** OR04

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2023  
**Filing Date:** 01/14/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
1/2 ownership share 53880 Pine Grove rd Lapine oregon [RP]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: deschutes, OR, US					
ameritrade ⇒ Antigenics Inc (ANTI) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
ameritrade ⇒ Marrone Bio Innovations, Inc. (MBII) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
ameritrade ⇒ Oakmark equity income [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ING/VOYA ⇒ 4020Voya Fixed Plus Account III [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: purchased by exchange					
ING/VOYA ⇒ Vanguard Target Retirement 2025 Fnd Inv [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: exchanged - you call it a purchase					
oakmark select [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<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>
Pentagon Federal Credit Union [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
selco credit union [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
selco credit union [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Touchstone Balanced Fund [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: 5,000 withdrawn					
wright patman federal credit union [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: deposit of funds withdrawn from TSP					

\* 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>
ameritrade ⇒ oakmark equity income [IR]		11/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: required minimum distribution					
ING/VOYA ⇒ oakmark equity income [MF]	SP	10/17/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: required minimum distribution					

\* 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

None disclosed.

## SCHEDULE D: LIABILITIES

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
JT	Mr Cooper	/ARC home sold loan to Mr Cooper in June 2021	Home mortgage	\$100,001 - \$250,000

## **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**

- ameritrade
- ameritrade (Owner: SP)
- ING/VOYA (Owner: SP)  
DESCRIPTION: 457 plan ING changed its name to voya

## **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. Peter A. DeFazio , 01/14/2023