



Filing ID #10051375

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Suzanne Bonamici  
**Status:** Member  
**State/District:** OR01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 07/12/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise Managed Asset Account ⇒ Allspring Emerg. Mkts. Equity [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [EF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Mainstay Mackay Tax Free Bond [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Int'l. Intrins. Value [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise Managed Asset Account ⇒ MFS Muni. High Inc. [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Mgr. Total Return Bond Strat. [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Mgr. Value Strat. [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Nuveen Ltd. Term Muni. Bond [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF [EF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Western Asset Interm. Term Muni. [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Michael H. Simon Royalties ⇒ Concord Theatricals [IP]	SP	\$15,001 - \$50,000	Royalties	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Royalties from The Odd Couple and Promises, Promises					
Michael H. Simon Royalties ⇒ GEP Talent Services, LLC [IP]	SP	\$1,001 - \$15,000	Royalties	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: miscellaneous television rerun royalties					
Michael H. Simon Royalties ⇒ International Authors Society [IP]	SP	\$15,001 - \$50,000	Royalties	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Royalties from The Odd Couple					
Miscellaneous Assets Jointly Owned ⇒ Ameriprise Cash Holding [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Gold coins [CO]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒	JT	\$100,001 -	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual Life Ins. Co. [OT] DESCRIPTION: life ins. cash value		\$250,000			<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ U.S. Bank NA [BA] DESCRIPTION: checking and savings	JT	\$500,001 - \$1,000,000	Interest	\$1 - \$200	<input type="checkbox"/>
Suzanne's Personal Assets ⇒ Franklin Growth Alloc. Mutual Fund [MF] DESCRIPTION: held in Suzanne's personal IRA at Ameriprise		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Suzanne's Personal Assets ⇒ OnPoint Community Credit Union [BA] DESCRIPTION: checking, savings, and money market		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index Mut. Fund [MF]	SP	\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Federal Money Mkt. Fund [BA]	SP	\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP Mut. Fund [MF]	SP	\$500,001 - \$1,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Allspring Emerg. Mkts. Equity [MF]	JT	02/14/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Allspring Emerg. Mkts. Equity [MF]	JT	05/17/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Allspring Emerg. Mkts. Equity [MF]	JT	08/15/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Allspring Emerg. Mkts. Equity [MF]	JT	11/18/2022	P	\$509.00	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Allspring Emerg. Mkts. Equity [MF] DESCRIPTION: dividends reinvested	JT	12/22/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF]	JT	02/14/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF]	JT	05/17/2022	S (partial)	\$568.00	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF]	JT	08/15/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF]	JT	11/18/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF] DESCRIPTION: dividends reinvested	JT	12/21/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [EF]	JT	02/14/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [EF]	JT	05/17/2022	P	\$671.00	
Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [EF]	JT	08/15/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [EF]	JT	11/18/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	02/14/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	05/17/2022	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	08/15/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF]	JT	11/21/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF] DESCRIPTION: dividends reinvested	JT	12/14/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF] DESCRIPTION: dividends reinvested	JT	12/21/2022	P	\$551.00	
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF]	JT	02/14/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF]	JT	05/17/2022	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF]	JT	08/15/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF]	JT	11/21/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF] DESCRIPTION: dividends reinvested	JT	12/14/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF] DESCRIPTION: dividends reinvested	JT	12/21/2022	P	\$315.00	
Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF]	JT	02/14/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF]	JT	05/17/2022	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF]	JT	08/15/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF]	JT	11/18/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF] DESCRIPTION: dividends reinvested	JT	12/23/2022	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Mainstay Mackay Tax Free Bond [MF]	JT	02/14/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Mainstay Mackay Tax Free Bond [MF]	JT	05/17/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Mainstay Mackay Tax Free Bond [MF]	JT	08/15/2022	P	\$177.00	
Ameriprise Managed Asset Account ⇒ Mainstay Mackay Tax Free Bond [MF]	JT	11/18/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Int'l. Intrins. Value [MF]	JT	02/14/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ MFS Int'l. Intrins. Value [MF]	JT	05/17/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Int'l. Intrins. Value [MF]	JT	11/18/2022	S (partial)	\$346.00	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Int'l. Intrins. Value [MF]	JT	12/9/2022	P	\$1,001 - \$15,000	
DESCRIPTION: dividends reinvested					
Ameriprise Managed Asset Account ⇒ MFS Muni. High Inc. [MF]	JT	02/14/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Muni. High Inc. [MF]	JT	05/17/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Muni. High Inc. [MF]	JT	08/15/2022	P	\$478.00	
Ameriprise Managed Asset Account ⇒ MFS Muni. High Inc. [MF]	JT	11/18/2022	P	\$224.00	
Ameriprise Managed Asset Account ⇒ MFS Value [MF]	JT	02/14/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value [MF]	JT	05/17/2022	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ MFS Value [MF]	JT	08/15/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value [MF]	JT	11/18/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value [MF]	JT	12/16/2022	P	\$1,001 - \$15,000	
DESCRIPTION: dividends reinvested					
Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF]	JT	02/14/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF]	JT	05/17/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF]	JT	08/15/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF]	JT	11/18/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF]	JT	12/12/2022	P	\$1,001 - \$15,000	
DESCRIPTION: dividends reinvested					
Ameriprise Managed Asset Account ⇒ Multi Mgr. Total Return Bond Strat. [MF]	JT	02/14/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Mgr. Total Return Bond Strat. [MF]	JT	05/17/2022	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ Multi Mgr. Total Return Bond Strat. [MF]	JT	08/15/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Mgr. Total Return Bond Strat. [MF]	JT	11/18/2022	P	\$774.00	
Ameriprise Managed Asset Account ⇒ Multi Mgr. Value Strat. [MF]	JT	02/14/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Mgr. Value Strat. [MF]	JT	05/17/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Multi Mgr. Value Strat. [MF]	JT	08/15/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi Mgr. Value Strat. [MF]	JT	11/18/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi Mgr. Value Strat. [MF] DESCRIPTION: dividends reinvested	JT	12/9/2022	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ Nuveen Ltd. Term Muni. Bond [MF]	JT	02/14/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Nuveen Ltd. Term Muni. Bond [MF]	JT	05/17/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Nuveen Ltd. Term Muni. Bond [MF]	JT	08/15/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Nuveen Ltd. Term Muni. Bond [MF]	JT	11/18/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF [EF]	JT	02/14/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF [EF]	JT	05/17/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF [EF]	JT	08/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF [EF]	JT	11/18/2022	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Western Asset Interim. Term Muni. [MF]	JT	02/14/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Western Asset Interim. Term Muni. [MF]	JT	05/17/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Western Asset Interim. Term Muni. [MF]	JT	08/15/2022	P	\$1,001 - \$15,000	



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Western Asset Interm. Term Muni. [MF]	JT	11/18/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Suzanne's Personal Assets ⇒ Franklin Growth Alloc. Mutual Fund [MF]  DESCRIPTION: dividends reinvested		06/16/2022	P	\$1,001 - \$15,000	

\* 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 C: EARNED INCOME

Source	Type	Amount
United States Judges (Administrative Office of U.S. Courts)	Spouse Salary	N/A

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

None disclosed.

### 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?
J Street Education Fund	02/18/2022	02/25/2022	Portland, OR - Tel Aviv, Israel - Portland, OR	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Ameriprise Managed Asset Account (Owner: JT)  
LOCATION: US
- Michael H. Simon Royalties (Owner: SP)  
LOCATION: US
- Miscellaneous Assets Jointly Owned (Owner: JT)  
LOCATION: US
- Suzanne's Personal Assets  
LOCATION: US
- The Michael H. Simon Rollover IRA at Vanguard (Owner: SP)  
LOCATION: US

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. Suzanne Bonamici , 07/12/2023