



Filing ID #10056277

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Susheela Jayapal
Status: Congressional Candidate
State/District: OR03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 02/29/2024
Period Covered: 01/01/2023– 01/30/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Eagle Strategies Managed Trust Investments [OT]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends, Interest	None	\$15,001 - \$50,000
DESCRIPTION: Advisor discretionary managed account comprised of mutual funds, ETF's & Money Market funds.					
Felton Properties - Real Estate LLC [OT]		\$15,001 - \$50,000	Distribution	None	\$5,001 - \$15,000
DESCRIPTION: Ownership interest in a real estate LLC.					
First Republic Checking [BA]		\$15,001 - \$50,000	None		
First Republic Money Market [BA]		\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
New York Life Fixed Annuity [FN]		\$100,001 - \$250,000	Tax-Deferred		
New York Life Fixed Annuity - IRA [FN]		\$250,001 - \$500,000	Tax-Deferred		
PERS IAP [MF]		\$15,001 - \$50,000	Tax-Deferred		
Susheela Jayapal Rollover IRA [MF]		\$500,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
		\$1,000,000			
Susheela Jayapal Roth IRA [MF]		\$15,001 - \$50,000	Roth tax free	None	None
Voya Deferred Comp 403(b) [MF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Mutual funds in a 403(b) deferred comp plan.					

* 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 Current Year to Filing	Amount Preceding Year
Multnomah County	My salary		\$124,916.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Guild Mortgage	2021	Primary Residence Mortgage	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member, Board of Directors	Literary Arts

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

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: Susheela Jayapal , 02/29/2024