



Filing ID #10041534

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Janice D. Schakowsky
Status: Member
State/District: IL09

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2020
Filing Date: 08/5/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AmCap Fund Inc Class A [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Purchase Partial					
AmCap Fund Inc Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
American High Income Trust Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Bond Fund of America [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Bright Directions [5P]	JT	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
LOCATION: IL					
DESCRIPTION: Sale (Part)					
CIBC Checking [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Devon Bank Checking [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
European Growth Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Franklin Strategic SER Biotech Discover Fund Class A [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Purchase (part)					
Fundamental Investors [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Growth Fund of America [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Growth Fund of America [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Hartford Mutual MidCap Fund Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Hartford Mutual World Bank Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Intermediate Bond Fund Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual Money Market (Deposit held by Dryfus Inc) [BA]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Putnam Equity Inc. [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Small Cap World Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State of Illinois [PE]		Undetermined	Tax-Deferred		<input type="checkbox"/>
United of Omaha Universal Life Insurance [WU]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Washington Mutual Investor Fund Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
AmCap Fund Inc Class A [MF]	SP	08/26/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Bright Directions [5P]	JT	01/13/2020	S (partial)	\$1,001 - \$15,000	
LOCATION: IL					
Bright Directions [5P]	JT	08/21/2020	S (partial)	\$1,001 - \$15,000	
LOCATION: IL					
Bright Directions [5P]	JT	09/23/2020	S (partial)	\$1,001 - \$15,000	
LOCATION: IL					
Franklin Strategic SER Biotech Discover Fund Class A [MF]	SP	08/26/2020	P	\$1,001 - \$15,000	
Putnam Equity Inc. [MF]	SP	08/26/2020	P	\$1,001 - \$15,000	

* 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
State of Illinois	Legislative Pension	\$30,809.00
Strategic Consulting Group, NA	Spouse Salary	N/A
IRA Required Minimum Distribution- Northwestern Mutual	IRA Distribution	\$7,252.00
COMMENTS: Assets underlying IRA listed in Schedule A		
Spouse IRA - Required Minimum Distribution -- Wells Fargo - Robert Boggs Creamer Beneficiary IRA Adelaide B. Creamer Decd. - WRCS as custodian	IRA Distribution	N/A
COMMENTS: Assets underlying IRA listed in Schedule A		

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Chase	5/13	Mortgage -- 1101 Ridge Ave, Evanston, IL - Home	\$250,001 - \$500,000
JT	Chase	3/13	Mortgage -- 1711 Lake Shore Dr, Michigan City, IN - Vacation Home	\$100,001 - \$250,000

Owner Creditor		Date Incurred	Type	Amount of Liability
JT	Devon Bank	12/14	Home Equity Loan	\$15,001 - \$50,000
SP	Citi Bank A Advantage	12/17	Credit Card Debt	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	International Labor Rights Forum (uncompensated)
Policy Council Member	Illinois Citizen Action - Uncompensated

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 1999	State of Illinois - Jan Schakowsky	Continued participation in State Pension Plan

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.

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

COMMENTS

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. Janice D. Schakowsky , 08/5/2021