



Filing ID #10053606

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Chrissy Houlahan
Status: Member
State/District: PA06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 05/14/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank Accounts ⇒ Ardent Credit Union [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank Accounts ⇒ Wells Fargo [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Discovery Growth Fund [MF]	JT	\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Discovery Value Fund [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Emerging Markets Portfolio [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Small Cap Core Portfolio [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [GS]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Ishares Core Intl Stock ETF [EF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF]	JT	\$100,001 - \$250,000	Dividends, Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Barton W Houlahan IRA Rollover ⇒ AllianceBernstein All Market R Class [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Growth Fund [MF]	SP	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Value Fund [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Emerging Markets Portfolio [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Intl Strategic Equities [MF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Small Cap Core Portfolio [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustain Global Theme [MF]	SP	\$250,001 - \$500,000	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Christina J Houlahan IRA 13743 ⇒ AB All Market Class [MF]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Christina J Houlahan Trust 50974 ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bernstein Diversified Municipal Portfolio [GS]					

* 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?
Bart and Christina Houlahan 03694 ⇒ AB Discovery Growth Fund [MF]	JT	10/28/2022	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Discovery Value Fund [MF]	JT	10/28/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Emerging Markets Portfolio [MF]	JT	12/19/2022	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF]	JT	12/9/2022	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF]	JT	12/19/2022	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF]	JT	01/19/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF]	JT	10/24/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF]	JT	12/8/2022	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF]	JT	12/8/2022	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [MF]	JT	04/19/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [MF]	JT	09/12/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒	JT	09/12/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Bernstein Diversified Municipal Portfolio [MF]			(partial)		<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [MF]	JT	09/12/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [MF]	JT	09/12/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [MF]	JT	09/12/2022	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Ishares Core Intl Stock ETF [MF]	JT	10/24/2022	P	\$15,001 - \$50,000	
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF]	JT	09/12/2022	P	\$15,001 - \$50,000	
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF]	JT	12/14/2022	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF]	JT	04/19/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF]	JT	04/19/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF]	JT	04/19/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF]	JT	09/12/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF]	JT	09/12/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF]	JT	09/12/2022	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Barton W Houlahan IRA Rollover ⇒ AB All Market Class [MF]	SP	12/7/2022	P	\$1,001 - \$15,000	
Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF]	SP	12/14/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Growth Fund [MF]	SP	10/10/2022	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Value Fund [MF]	SP	10/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Intl Strategic Equities [MF]	SP	12/12/2022	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustain Global Theme [MF]	SP	12/8/2022	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustain Global Theme [MF]	SP	12/8/2022	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustain Global Theme [MF]	SP	01/19/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Christina J Houlahan IRA 13743 ⇒ AB All Market Class [MF]		12/7/2022	P	\$1,001 - \$15,000	
Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF]		12/14/2022	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
B Lab	Spouse Salary	\$205,471.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Ardent Credit Union	September 2020	Mortgage of Primary Residence	\$500,001 - \$1,000,000
JT	Ardent Credit Union	September 2022	Mortgage on Second Home	\$250,001 - \$500,000
JT	Barclays Bank Mastercard	December 2022	Credit Card Debt for new Boiler and Water	\$15,001 - \$50,000

Heater

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?
Climate Solutions Foundation	11/9/2022	11/13/2022	Newark, NJ - Sharm El-Shiekh, Egypt - Newark, NJ	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COMMENTS: Trip to COP 27 as the co-chair of the bi-partisan Climate Solutions Caucus							

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Bank Accounts (Owner: JT)
LOCATION: US
- Bart and Christina Houlahan 03694 (Owner: JT)
LOCATION: US
- Barton W Houlahan IRA Rollover (Owner: SP)
DESCRIPTION: IRA
- Barton W. Houlahan Irrevocable Trust 33482 (Owner: SP)
- Christina J Houlahan IRA 13743
- Christina J Houlahan Trust 50974

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. Chrissy Houlahan , 05/14/2023