



Filing ID #10044947

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 07/14/2022

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 (fka Wells Fargo Emerg. Mkts. Equity) [MF] | JT | \$50,001 - \$100,000 | Capital Gains, Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF] | JT | \$50,001 - \$100,000 | Capital Gains, Dividends | \$1,001 - \$2,500 | <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 | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF] | JT | \$100,001 - \$250,000 | Capital Gains, Dividends | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF] | JT | \$100,001 - \$250,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <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 ⇒ | JT | \$50,001 - | Capital Gains, | \$5,001 - | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-----------------------|--------------------------|---------------------|-------------------------------------|
| MFS Int'l. Instrins. Value [MF] | | \$100,000 | Dividends | \$15,000 | <input type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ MFS Muni. High Inc. [MF] | JT | \$50,001 - \$100,000 | 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 | \$100,001 - \$250,000 | 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 Interim. Term Muni. [MF] | JT | \$100,001 - \$250,000 | Capital Gains, Dividends | \$2,501 - \$5,000 | <input checked="" type="checkbox"/> |
| Michael H. Simon Royalties ⇒ Concord Theatricals (fka as Samuel French, Inc. and Tams-Witmark Music Library, Inc.) [IP] | SP | \$15,001 - \$50,000 | Royalties | \$2,501 - \$5,000 | <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"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|----------------------------|--------------------------|----------------------|-------------------------------------|
| Miscellaneous Assets Jointly Owned ⇒ Northwestern Mutual Life Ins. Co. [OT] | JT | \$100,001 - \$250,000 | Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| DESCRIPTION: life ins. cash value | | | | | |
| Miscellaneous Assets Jointly Owned ⇒ U.S. Bank NA [BA] | JT | \$500,001 - \$1,000,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: checking and savings accounts | | | | | |
| Suzanne's Personal Assets ⇒ Franklin Growth Alloc. [MF] | | \$50,001 - \$100,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| DESCRIPTION: held in Suzanne's personal IRA at Ameriprise | | | | | |
| Suzanne's Personal Assets ⇒ OnPoint Community Credit Union [BA] | | \$100,001 - \$250,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: checking and savings accounts | | | | | |
| The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index Mut. Fund [MF] | SP | Spouse/DC Over \$1,000,000 | Dividends | \$15,001 - \$50,000 | <input type="checkbox"/> |
| The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Federal Money Mkt. Fund [BA] | SP | Spouse/DC Over \$1,000,000 | Dividends | \$1 - \$200 | <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 (fka Wells Fargo Emerg. Mkts. Equity) [MF] | JT | 01/21/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Allspring Emerg. Mkts. Equity (fka Wells Fargo Emerg. Mkts. Equity) [MF] | JT | 02/11/2021 | P | \$15,001 - \$50,000 | |
| Ameriprise Managed Asset Account ⇒ Allspring Emerg. Mkts. Equity (fka Wells Fargo Emerg. Mkts. Equity) [MF] | JT | 05/13/2021 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|-------------|---------------------|-------------------------------------|
| Ameriprise Managed Asset Account ⇒ Allspring Emerg. Mkts. Equity (fka Wells Fargo Emerg. Mkts. Equity) [MF] | JT | 08/11/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Allspring Emerg. Mkts. Equity (fka Wells Fargo Emerg. Mkts. Equity) [MF] | JT | 11/15/2021 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF] DESCRIPTION: Dividend auto reinvestment | JT | 12/17/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF] | JT | 01/21/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF] | JT | 02/11/2021 | S (partial) | \$128.00 | <input type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF] | JT | 05/13/2021 | S (partial) | \$112.00 | <input type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF] | JT | 08/11/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Int'l. Opptys [MF] | JT | 11/15/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [EF] | JT | 01/21/2021 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [EF] | JT | 02/11/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [EF] | JT | 05/13/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [EF] | JT | 08/11/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ ISHARES MSCI EAFE Value [EF] | JT | 11/15/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF] | JT | 01/21/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|-------------|---------------------|-------------------------------------|
| Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF] | JT | 01/21/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF] | JT | 05/13/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF] | JT | 08/11/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF] | JT | 11/15/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth [MF] | JT | 12/14/2021 | P | \$15,001 - \$50,000 | |
| DESCRIPTION: Dividend auto reinvestment | | | | | |
| Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF] | JT | 01/21/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF] | JT | 02/11/2021 | S (partial) | \$990.00 | <input type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF] | JT | 05/13/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF] | JT | 08/11/2021 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF] | JT | 11/15/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity [MF] | JT | 12/14/2021 | P | \$15,001 - \$50,000 | |
| DESCRIPTION: Dividend auto reinvestment | | | | | |
| Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF] | JT | 01/21/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF] | JT | 02/11/2021 | S (partial) | \$900.00 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ | JT | 05/13/2021 | P | \$600.00 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|-------------|---------------------|-------------------------------------|
| Loomis Sayles Growth [MF] | | | | | |
| Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF] | JT | 08/11/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF] | JT | 11/15/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Loomis Sayles Growth [MF] | JT | 12/23/2021 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Dividend auto reinvestment | | | | | |
| Ameriprise Managed Asset Account ⇒ Mainstay Mackay Tax Free Bond [MF] | JT | 01/21/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Mainstay Mackay Tax Free Bond [MF] | JT | 02/11/2021 | P | \$105.00 | |
| Ameriprise Managed Asset Account ⇒ Mainstay Mackay Tax Free Bond [MF] | JT | 05/13/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Mainstay Mackay Tax Free Bond [MF] | JT | 08/11/2021 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Mainstay Mackay Tax Free Bond [MF] | JT | 11/15/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ MFS Int'l. Instrins. Value [MF] | JT | 01/21/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ MFS Int'l. Instrins. Value [MF] | JT | 02/11/2021 | P | \$870.00 | |
| Ameriprise Managed Asset Account ⇒ MFS Int'l. Instrins. Value [MF] | JT | 05/13/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ MFS Int'l. Instrins. Value [MF] | JT | 08/11/2021 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ MFS Int'l. Instrins. Value [MF] | JT | 11/15/2021 | P | \$15,001 - \$50,000 | |
| Ameriprise Managed Asset Account ⇒ | JT | 12/10/2021 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|-------------|---------------------|-------------------------------------|
| MFS Int'l. Instrns. Value [MF] | | | | | |
| DESCRIPTION: Dividend auto reinvestment | | | | | |
| Ameriprise Managed Asset Account ⇒ MFS Muni. High Inc. [MF] | JT | 01/21/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ MFS Muni. High Inc. [MF] | JT | 02/11/2021 | S (partial) | \$175.00 | <input type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ MFS Muni. High Inc. [MF] | JT | 05/13/2021 | P | \$400.00 | |
| Ameriprise Managed Asset Account ⇒ MFS Muni. High Inc. [MF] | JT | 08/11/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ MFS Muni. High Inc. [MF] | JT | 11/15/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ MFS Value [MF] | JT | 01/21/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ MFS Value [MF] | JT | 02/11/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ MFS Value [MF] | JT | 05/13/2021 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ MFS Value [MF] | JT | 08/11/2021 | S (partial) | \$124.00 | <input type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ MFS Value [MF] | JT | 11/15/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ MFS Value [MF] | JT | 12/17/2021 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Dividend auto reinvestment | | | | | |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF] | JT | 01/21/2021 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF] | JT | 02/11/2021 | S | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|-------------|---------------------|-------------------------------------|
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF] | JT | 05/13/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF] | JT | 08/11/2021 | P | \$690.00 | |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF] | JT | 11/15/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Small Cap Equity Strat. [MF] | JT | 12/10/2021 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Dividend auto reinvestment | | | | | |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Total Return Bond Strat. [MF] | JT | 01/21/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Total Return Bond Strat. [MF] | JT | 02/11/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Total Return Bond Strat. [MF] | JT | 05/13/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Total Return Bond Strat. [MF] | JT | 08/11/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Total Return Bond Strat. [MF] | JT | 11/15/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Value Strat. [MF] | JT | 01/21/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Value Strat. [MF] | JT | 02/11/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Value Strat. [MF] | JT | 05/13/2021 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Value Strat. [MF] | JT | 08/11/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Multi Mgr. Value Strat. [MF] | JT | 11/15/2021 | 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] DESCRIPTION: Dividend auto reinvestment | JT | 12/9/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Nuveen Ltd. Term Muni. Bond [MF] | JT | 01/21/2021 | P | \$15,001 - \$50,000 | |
| Ameriprise Managed Asset Account ⇒ Nuveen Ltd. Term Muni. Bond [MF] | JT | 02/11/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Nuveen Ltd. Term Muni. Bond [MF] | JT | 05/13/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Nuveen Ltd. Term Muni. Bond [MF] | JT | 08/11/2021 | P | \$15,001 - \$50,000 | |
| Ameriprise Managed Asset Account ⇒ Nuveen Ltd. Term Muni. Bond [MF] | JT | 11/15/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF [EF] | JT | 01/21/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF [EF] | JT | 02/11/2021 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF [EF] | JT | 05/13/2021 | P | \$230.00 | |
| Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF [EF] | JT | 08/11/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF [EF] | JT | 11/15/2021 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Ameriprise Managed Asset Account ⇒ Western Asset Inter. Term Muni. [MF] | JT | 01/21/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Western Asset Inter. Term Muni. [MF] | JT | 05/13/2021 | P | \$1,001 - \$15,000 | |
| Ameriprise Managed Asset Account ⇒ Western Asset Inter. Term Muni. [MF] | JT | 08/11/2021 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------|--------------------|---------------------|
| Ameriprise Managed Asset Account ⇒ Western Asset Inter. Term Muni. [MF] | JT | 11/15/2021 | P | \$1,001 - \$15,000 | |
| Suzanne's Personal Assets ⇒ Franklin Growth Alloc. [MF] DESCRIPTION: Dividend auto reinvestment | | 06/29/2021 | P | \$1,001 - \$15,000 | |
| Suzanne's Personal Assets ⇒ Franklin Growth Alloc. [MF] DESCRIPTION: Dividend auto reinvestment | | 12/31/2021 | 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

None disclosed.

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 , 07/14/2022