



Filing ID #10059962

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Anita S. Chen  
**Status:** Congressional Candidate  
**State/District:** CA17

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 08/11/2024  
**Period Covered:** 01/01/2023– 07/14/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bitcoin [OT]		\$1,001 - \$15,000	Bitcoin	\$1 - \$200	\$1,001 - \$2,500
DESCRIPTION: Held by Paypal.					
BofA 860 [BA]		\$15,001 - \$50,000	None		
DESCRIPTION: Checking account. Amount was emptied in April 2024 and transferred to Chase Bank account 618, which is reported elsewhere in this report.					
California Condo [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: San Jose, CA, US					
Chase Business 352 [BA]		\$1,001 - \$15,000	None		
Chase Personal 333 [BA]		\$1 - \$1,000	None		
Chase Personal 618 [BA]		\$15,001 - \$50,000	None		
DESCRIPTION: Bulk of money transferred from BofA 860.					
Chase Personal 814 [BA]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Emergency Fund 253 ⇒ Schwab Value Advantage Money Fund [OT]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Increase due to market value increase.					
Gemini Rewards ⇒ Bitcoin [CT]		\$1 - \$1,000	Bitcoin	\$1 - \$200	\$1 - \$200
DESCRIPTION: Bitcoin given as a credit card reward. August 2024 value = \$1.72					
Gemini Rewards ⇒ Ether [CT]		\$1 - \$1,000	Ether	\$1 - \$200	\$1 - \$200
DESCRIPTION: Cryptocurrency held as rewards of credit card spending. August 2024 = \$25.60					
HSA Lively [OT]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Health savings account held jointly between Charles Schwab and Lively.					
Individual 401(k) 992 ⇒ SCHWAB S&P 500 INDEX [MF]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Increase due to market value increase.					
Individual 401(k) 992 ⇒ SPDR S&P 500 ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Increase due to market value increase.					
Individual Brokerage 036 ⇒ SCHWAB S&P 500 INDEX [OP]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1,001 - \$2,500
DESCRIPTION: Value of asset due to sale and repurchase of the same mutual fund.					
Individual Brokerage 036 ⇒ SPDR S&P 500 ETF [EF]		\$1 - \$1,000	Dividends	None	\$201 - \$1,000
DESCRIPTION: Market value decrease due to market value loss. Asset was sold in Feb 2023.					
Individual Brokerage 036 ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]		\$1 - \$1,000	Dividends	None	\$1 - \$200
DESCRIPTION: Loss in value because stock was sold and amount withdrawn.					
Individual Brokerage 236 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	None
DESCRIPTION: Purchased in July 2024.					
Individual Brokerage 236 ⇒ SCHWAB S&P 500 INDEX [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$201 - \$1,000
DESCRIPTION: Increase due to additional purchase of shares.					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Individual Brokerage 236 ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$5,001 - \$15,000
DESCRIPTION: Loss due to loss of market value and sale of stocks.					
LearningQuest Education Saving Program 302 ⇒ American Century Focused Global Growth Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ American Century Global Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ American Century Global Real Estate Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ American Century Growth Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ American Century Heritage Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ American Century Mid Cap Value Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ American Century Short Duration Inflation Protection Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ American Century Small Cap Growth Fund [MF]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ American Century Small Cap Value Fund [MF]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ American Century Value Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ Avantis U.S. Equity Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ Baird Core Plus Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ Schwab S&P 500 Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ Vanguard Total Bond Market Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
LearningQuest Education Saving Program 302 ⇒ Vanguard Total International Stock Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
Nevada House [RP]	JT	\$250,001 - \$500,000	Rent	\$201 - \$1,000	\$5,001 - \$15,000
LOCATION: Henderson, CA, US					
DESCRIPTION: Property is held jointly with the candidate holding 25% ownership.					
Partnership Holding 100, 80% Interest [OL]		None	Rent	None	\$50,001 - \$100,000
LOCATION: San Jose, CA, US					
DESCRIPTION: Partnership is a property management company and was closed in December 2023.					
Paypal Account [BA]		\$1,001 - \$15,000	None		
Robinhood ⇒ Bitcoin [CT]		\$1 - \$1,000	Bitcoin	\$1 - \$200	\$1 - \$200
DESCRIPTION: Purchased as part of Robinhood portfolio. August 2024 value = \$137.79					
Robinhood ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Held as part of Robinhood portfolio. August 2024 Value = \$6.09					
Roth Contributory IRA 109 ⇒ INVSC QQQ TRUST SRS 1 [EF]		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
DESCRIPTION: Increase due to market value increase.					
Roth Contributory IRA 109 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: Purchased in July 2024					
Roth Contributory IRA 109 ⇒ SCHWAB INTERNATIONAL IND [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: This mutual fund was sold to purchase another with no withdrawal of funds from the account.					
Roth Contributory IRA 109 ⇒ SCHWAB S&P 500 INDEX [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Value increase due to addition mutual fund purchases and market value increase.					
Roth Contributory IRA 109 ⇒ SCHWAB SMALL CAP INDEX [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: This mutual fund was sold to purchase another with no withdrawal of funds from the account.					
Roth Contributory IRA 109 ⇒ SCHWAB TOTAL STOCK MARKET INDEX [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Value increase due to additional purchase of shares and market value increase.					
Roth Contributory IRA 109 ⇒ SCHWAB VALUE ADVANTAGE MONEY INVESTMENT [BA]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Increase due to market value increase.					
Roth Contributory IRA 109 ⇒ SPDR S AND P 500 ESG [EF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Increase due to market value increase and additional shares purchased.					
Roth Contributory IRA 109 ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Value increase due to market value increase.					
Simplified Employee Plan 933 ⇒ QQQ [EF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Increase due to market value increase.					
Simplified Employee Plan 933 ⇒ SCHWAB S&P 500 INDEX [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Increase due to market value increase and mutual fund purchases.					
Simplified Employee Plan 933 ⇒		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
<b>SCHWAB SMALL CAP INDEX [MF]</b>					
DESCRIPTION: Increase due to market value increase and additional mutual fund purchases.					
Simplified Employee Plan 933 ⇒ <b>SCHWAB TOTAL STOCK MARKET [MF]</b>		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Increase due to market value increase and additional mutual stock purchases.					
Simplified Employee Plan 933 ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Increase due to market value increase.					
Vanguard Individual Brokerage 241 ⇒ <b>VANGUARD GROWTH INDEX ADMIRAL [MF]</b>		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$15,001 - \$50,000
DESCRIPTION: Market value increase due to market value increase. Funds withdrawn from account April 2023.					

\* Investment vehicle 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**

<b>Source</b>	<b>Type</b>	<b>Amount Current Year to Filing</b>	<b>Amount Preceding Year</b>
Courageous Communications	Teaching English Writing and Public Speaking	\$36,566.00	\$95,221.00

## **SCHEDULE D: LIABILITIES**

None disclosed.

## **SCHEDULE E: POSITIONS**

<b>Position</b>	<b>Name of Organization</b>
Founder	Courageous Communications
Partner	Global Trimension Impact

## **SCHEDULE F: AGREEMENTS**

<b>Date</b>	<b>Parties To</b>	<b>Terms of Agreement</b>
April 2017	Anita Chen and Courageous Communications	I am self-employed as a sole proprietor and I have participation in employment-related accounts. This submission is for the Simplified Employee Plan.

Date	Parties To	Terms of Agreement
May 2022	Anita Chen and Courageous Communications	I am self-employed as a sole proprietor and I have participation in employment-related accounts. This submission is for the individual 401k.
April 2017	Anita Chen and Courageous Communications	I am self-employed as a sole proprietor and I have participation in employment-related accounts. This submission is for the Roth 401k.

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

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- Emergency Fund 253  
LOCATION: US  
DESCRIPTION: Held by Charles Schwab.
- Gemini Rewards  
LOCATION: US  
DESCRIPTION: Gemini credit card gives rewards in cryptocurrency.
- Individual 401(k) 992  
DESCRIPTION: Held by Charles Schwab.
- Individual Brokerage 036  
LOCATION: US  
DESCRIPTION: Held with Charles Schwab
- Individual Brokerage 236  
LOCATION: US  
DESCRIPTION: Held by Charles Schwab.
- LearningQuest Education Saving Program 302  
LOCATION: KS  
DESCRIPTION: Held by LearningQuest 70% Equity Portfolio.
- Robinhood  
DESCRIPTION: Robinhood is an online brokerage firm.
- Roth Contributory IRA 109  
DESCRIPTION: Held by Charles Schwab.
- Simplified Employee Plan 933  
DESCRIPTION: Held by Charles Schwab.
- Vanguard Individual Brokerage 241  
LOCATION: US  
DESCRIPTION: Held by Vanguard.

## 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:** Anita S. Chen , 08/11/2024