



Filing ID #10047198

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Stephen F. Lynch  
**Status:** Member  
**State/District:** MA08

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 05/13/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
3 Jason Terrace [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Boston, MA, US					
403(b) ⇒ American Funds Euro-Pacific [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ Federated Kaufman Small Cap A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ Fidelity Balanced Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ Fidelity Contra Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
403(b) ⇒ Invesco Developing Markets [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
403(b) ⇒ Nationwide Investor Destination Moderate Aggressive [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Bank of America [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
East Boston Savings Bank [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
IRA ⇒ Cisco Systems, Inc. (CSCO) [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Dell Technologies Inc. Class V (DVMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Intel Corporation (INTC) [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Morgan Stanley Institutional Fund Growth Portfolio [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Morgan Stanley Money Market Fund [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Pioneer Equity Income Fund [IH]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Pioneer Mid-Cap Growth Fund [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ VMware, Inc. Common stock, Class A (VMW) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: VMware was a stock spin off from Dell Technology					

\* 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

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
403(b) ⇒ American Funds Growth Fund [MF]		01/25/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: On January 25, 2021 by direction of the South Boston Community Health Center, American Funds Growth Fund (403(b)) was sold. Proceeds from the sale were used to purchase shares in the Fidelity Contra Fund.					
403(b) ⇒		01/25/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
<b>American Funds Income Fund [MF]</b>					
DESCRIPTION: On January 25, 2021, by direction of the South Boston Community Health Center, the 403(b) Retirement Portfolio that included American Funds Income Fund was replaced by Nationwide Investor Destination Moderate Aggressive Fund. Deleted from Schedule A - Asset and Unearned Income					
403(b) ⇒ Fidelity Contra Mutual Fund [MF]		01/25/2021	P	\$15,001 - \$50,000	
DESCRIPTION: On January 25, 2021 by direction of the South Boston Community Health Center, additional shares of Fidelity Contra Mutual Fund were purchased from the sale of the American Funds Growth Fund.					
403(b) ⇒ Nationwide Investor Destination Moderate Aggressive [MF]		01/25/2021	P	\$15,001 - \$50,000	
DESCRIPTION: By direction of the South Boston Community Health Center, on January 25, 2021 Nationwide Investor Destination Moderate Aggressive Mutual fund was added to the 403 (b) retirement portfolio. Added to Schedule A - Assets and Unearned Income					
IRA ⇒ Vmware, Inc. Common stock, Class A (VMW) [ST]		10/29/2021	E	\$1,001 - \$15,000	
DESCRIPTION: VMware Common Stock was a spin-off from Dell Technology					

\* 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

<b>Source</b>	<b>Type</b>	<b>Amount</b>
South Boston Community Health Center	Spouse Salary	N/A

## SCHEDULE D: LIABILITIES

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
JT	East Boston Savings Bank	Refinanced 2011	Mortgage on Primary Residence	\$250,001 - \$500,000
COMMENTS: Primary Residence is 55 G Street, South Boston, Massachusetts. In previous years, rental income was realized from the property and was reported on Schedule A- Assets and Unearned Income. In 2021, there was no rental income from the property and that is why the property is no longer listed on Schedule A - Assets and Unearned Income.				
JT	Quicken Loans	2019	Mortgage on Rental Property	\$100,001 - \$250,000
JT	Congressional Federal Credit Union	November 2008	Home Equity Line of Credit	\$10,000 - \$15,000

## SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Advisory Board	Edgerley Family South Boston Boys & Girls Club
COMMENTS: The Advisory Board position is uncompensated	

## **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**

- 403(b)
- IRA

## **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. Stephen F. Lynch , 05/13/2022