



Filing ID #10037078

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Mario Diaz-Balart  
**Status:** Member  
**State/District:** FL25

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2019  
**Filing Date:** 07/24/2020

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
"TIAA-CREF" ⇒ CREF Growth R1 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
"TIAA-CREF" ⇒ CREF Inf-Linked Bond R1 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
"TIAA-CREF" ⇒ CREF Money Market R1 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
"TIAA-CREF" ⇒ Tiaa Traditional [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Apple Inc. (AAPL) [ST]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Bank of America Savings Account [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
COMMENTS: Increase due to inheritance given to spouse					
Capital One Savings Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Florida Prepaid College Program [5P]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: FL					
Roth IRA- Fidelity Cash Reserves Fidelity Magellan [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State of Florida Pension(not self directed) [PE]		Undetermined	Tax-Deferred		<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

None disclosed.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount
Ladat, LLC	Spouse salary	N/A
COMMENTS: She went from being an employee at Dog Dude Ranch to being an independent contractor for Dog Dude Ranch and also did consulting work for The Seed School		

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Ditech	August 2005	Mortgage on personal residence	\$250,001 - \$500,000
	Credit Union Mortgage Association	August 2012	Mortgage on personal residence in Washington DC	\$100,001 - \$250,000
COMMENTS: Paid off mortgage in 2019 using spouses inheritance				

## SCHEDULE E: POSITIONS

Position	Name of Organization
Boardmember(unpaid)	Congressional Hispanic Leadership Institute
Vice Chair(unpaid)	124 D Street Condominium Association
Boardmember(unpaid)	National Association of Latino Elected & Appointed Officials

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2002	State of Florida	Pension for service in State Legislature

## 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

- o "TIAA-CREF" (Owner: SP)

## 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. Mario Diaz-Balart , 07/24/2020