



Filing ID #10052685

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Deborah Ross
Status: Member
State/District: NC02

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?
AMG Managers Special Equity (IRA) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
AMG Managers Special Equity (Roth) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Duke Retirement Plan ⇒ Vanguard Institutional Target 2030 Retirement Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Brokerage Account ⇒ Fidelity Money Market [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Fidelity Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity IRA 1 ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Albemarle Corporation (ALB) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity IRA 1 ⇒ Applied Materials, Inc. (AMAT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Cleveland-Cliffs Inc. (CLF) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ CrowdStrike Holdings, Inc. - Class A (CRWD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Fidelity Money Market [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Freeport-McMoRan, Inc. (FCX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Lam Research Corporation (LRCX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ SPDR S&P Bank ETF (KBE) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Walt Disney Company (DIS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Fidelity Money Market [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Gilead Sciences, Inc. (GILD) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ iShares MSCI Emerging Index Fund (EEM) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Ishares NASDAQ Biotechnology Fund [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Russell 1000 Value ETF (IWD) [EF]					<input type="checkbox"/>
Fidelity IRA 2 ⇒ iShares Russell 2000 ETF (IWM) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ iShares Semiconductor ETF (SOXX) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ iShares U.S. Home Construction ETF (ITB) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ JP Morgan Chase & Co. (JPM) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Materials Select Sector SPDR (XLB) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Roundhill Sports Betting & iGaming ETF (BETZ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR MidCap Trust Series I (MDY) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR S&P 500 (SPY) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR Series Trust SPDR Homebuilders ETF (XHB) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity IRA 2 ⇒ VanEck Gaming ETF (BJK) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ VanEck Semiconductor ETF (SMH) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Direxion Moonshot Innovators ETF (MOON) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Money Market [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Invesco Dynamic Leisure and Entertainment ETF (PEJ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Oracle Corporation (ORCL) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ SoFi Social 50 ETF (SFYF) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Unity Software Inc. (U) [ST]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Note this an exchange due to a merger between Ironsource and Unity Software					
Fox Rothschild RSP ⇒ Vanguard Institutional Target 2030 Retirement Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
IAB Brokerage Account (IRA) ⇒ Money Market [BA]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
IAB Brokerage Account (IRA) ⇒ NeoGenomics, Inc. (NEO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Mountain Rental [RP]	SP	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Lansing, NC, US					
Pension - State of North Carolina [PE]		Undetermined	Pension	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Pension - The American Civil Liberties Union [PE]		Undetermined	Pension	None	<input type="checkbox"/>
Primary Residence [RP] LOCATION: RALEIGH, NC, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
RS Growth Fund Class A (IRA) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC Fixed Income Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC International Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC Large Cap Core Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC Large Cap Index Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC Small Mid Cap Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC Small Mid Cap Index Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
State Employees Credit Union Accounts [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
TTA 401a ⇒ T Rowe Price LCG fund I class [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TTA 401a ⇒ T Rowe Price Overseas Stock Fund I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TTA 401a ⇒ Voya Fixed Account [BA]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TTA 457(b) ⇒ Fidelity Mid Cap Index fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TTA 457(b) ⇒ Fidelity small Cap Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TTA 457(b) ⇒ T Rowe Price LCG Fund I class [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Transfer from one investment manager to another.					
TTA 457(b) ⇒ Vanguard Target Retirement 2065 [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Unimproved Lot [RP]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
LOCATION: Avon, NC, US					
Vacation Rental [RP]	JT	\$500,001 - \$1,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Salvo, NC, US					
Vanguard 500 Index Fund Admiral (IRA) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Growth Index Fund Admiral (Roth) [MF]	SP	\$50,001 - \$100,000	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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]	JT	01/4/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]	JT	01/21/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]	JT	01/27/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ ironSource Ltd. Class A Ordinary Shares (IS) [ST]	SP	11/7/2022	E	\$1,001 - \$15,000	
DESCRIPTION: This was an exchange of IronSource for Unity Software due to a merger					
Fidelity Roth IRA ⇒ Unity Software Inc. (U) [ST]	SP	11/7/2022	E	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: This was an exchange of IronSource for Unity Software due to merger					
Fox Rothschild RSP ⇒ Vanguard Target Retirement 2030 [MF]		12/29/2022	P	\$1,001 - \$15,000	
DESCRIPTION: This was an annual distribution reinvestment.					
TTA 401a ⇒ Mission Squared Diversified International [MF]		04/27/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: This was the sale portion of transfer within a government 401 A from one investment manager to another, and from one comparable fund to another.					
TTA 401a ⇒ Mission Squared Growth Fund R1 [MF]		04/27/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: This was the sale portion of a transfer within a government 401 A from one investment manager to another, and from one comparable fund to another.					
TTA 401a ⇒ Mission Squared Plus Fund R1 [MF]		11/9/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: This was the sale portion of transfer within a government 401 A from one investment manager to another, and from one comparable fund to another.					
TTA 401a ⇒ T Rowe Price LCG Fund [MF]		04/27/2022	P	\$15,001 - \$50,000	
DESCRIPTION: This was a purchase portion of transfer within a government 401 A from one investment manager to another, and from one comparable fund to another.					
TTA 401a ⇒ T Rowe Price Overseas Stock Fund 1 [MF]		04/27/2022	P	\$1,001 - \$15,000	
DESCRIPTION: This was a purchase portion of transfer within a government 401 A from one investment manager to another, and from/to comparable funds.					
TTA 401a ⇒ Voya Fixed Account [MF]		11/10/2022	P	\$15,001 - \$50,000	
DESCRIPTION: This was the purchase portion of transfer within a government 401 A from one investment manager to another, and from one comparable fund to another.					
TTA 457(b) ⇒ Fidelity Mid Cap Index Fund [MF]		04/27/2022	P	\$15,001 - \$50,000	
DESCRIPTION: This was a purchase portion of transfer within a government 457 b from one investment manager to another, and from one comparable fund to another.					
TTA 457(b) ⇒ Fidelity OTC [MF]		04/27/2022	S	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: This was the sale portion of transfer within a government 457 b from one investment manager to another, and from one comparable fund to another.					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TTA 457(b) ⇒ Fidelity Small Cap Index Fund [MF]		04/27/2022	P	\$15,001 - \$50,000	
DESCRIPTION: This was a purchase portion of transfer within a government 457 b from one investment manager to another, and from one comparable fund to another.					
TTA 457(b) ⇒ Invesco OPP Global A [MF]		04/27/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: This was the sale portion of transfer within a government 457 b from one investment manager to another, and from one comparable fund to another.					
TTA 457(b) ⇒ Nationwide Mid Cap Mkt Index A [MF]		04/27/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: This was the sale portion of transfer within a government 457 b from one investment manager to another, and from one comparable fund to another.					
TTA 457(b) ⇒ NW Small Cap Index Fund [MF]		04/27/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: This was the sale portion of transfer within a government 457 b from one investment manager to another, and from one comparable fund to another.					
TTA 457(b) ⇒ T Rowe Price LCG Fund 1 Class [MF]		04/27/2022	P	\$50,001 - \$100,000	
DESCRIPTION: This was a purchase portion of transfer within a government 457 b from one investment manager to another, and from one comparable fund to another.					
TTA 457(b) ⇒ Vanguard Target Retirement 2065 [MF]		04/27/2022	P	\$15,001 - \$50,000	
DESCRIPTION: This was a purchase portion of transfer within a government 457 b from one investment manager to another, and from one comparable fund to another.					

* 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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	First National Bank	September 2012	Mortgage-Salvo	\$100,001 - \$250,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Caliber Home Loans	December 2020	Mortgage for DC residence	\$500,001 - \$1,000,000
JT	Amerisave Mortgage	June 2020	Mortgage for Raleigh Residence	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Brown Alumni Association
Advisory Board Member	Lightner Y Achievers

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2003	Myself and State of North Carolina	Continued participation in employee benefit plan. Vested in legislative pension plan after 5 years of legislative service, serving from 2003 to 2013
January 2003	Myself and State of North Carolina	Continued participation in employee health plan, with lifetime medical benefits upon attaining the age of 60.
September 1994	Myself and American Civil Liberties Union	Continued participation in employee pension plan, vesting after 7 years of service.

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?
US Assoc.of Former Members of Congress/Sasakawa Peace Fdn.	05/28/2022	06/4/2022	Raleigh, NC - Tokyo, Japan - Kyoto, Japan - Raleigh	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Aspen Institute Inc/Democracy Fund/Rockefeller Brothers Fund	08/29/2022	09/2/2022	Raleigh, NC - Reykjavik, Iceland - Raleigh, NC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Duke Retirement Plan
- Fidelity Brokerage Account (Owner: JT)
LOCATION: US
- Fidelity IRA 1 (Owner: SP)
- Fidelity IRA 2 (Owner: SP)
- Fidelity Roth IRA (Owner: SP)
- Fox Rothschild RSP
- IAB Brokerage Account (IRA) (Owner: SP)
- State 401k
- TTA 401a
- TTA 457(b)

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. Deborah Ross , 05/14/2023