



Filing ID #10048131

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Debbie Wasserman Schultz  
**Status:** Member  
**State/District:** FL23

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 08/12/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
"For The Next Generation" Published by St. Martin's Press [IP]		Undetermined	Royalties	None	<input type="checkbox"/>
Akebia Therapeutics, Inc. (AKBA) [ST] DESCRIPTION: Dependent A	DC	None	None		<input type="checkbox"/>
Akebia Therapeutics, Inc. (AKBA) [ST]	DC	None	None		<input type="checkbox"/>
Akebia Therapeutics, Inc. (AKBA) [ST]	DC	None	None		<input type="checkbox"/>
Alamos Gold Inc. Class A Common Shares (AGI) [ST] DESCRIPTION: Dependent child A	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Alamos Gold Inc. Class A Common Shares (AGI) [ST] DESCRIPTION: Dependent child B	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Alamos Gold Inc. Class A Common Shares (AGI) [ST] DESCRIPTION: Dependent child C	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Alamos Gold Inc. Class A Common Shares (AGI) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Berry Corporation (BRY) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Berry Corporation (BRY) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent child A					
Berry Corporation (BRY) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent child B					
Berry Corporation (BRY) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent child C					
CCHC Partners LLC, 100% Interest [OL]	SP	\$1,001 - \$15,000	Ordinary business income	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Davie, FL, US					
DESCRIPTION: Mortgage lending business					
Celestica, Inc. (CLS) [ST]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Dependent child A					
Celestica, Inc. (CLS) [ST]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Dependent child B					
Celestica, Inc. (CLS) [ST]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Dependent child C					
Celestica, Inc. (CLS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab Bank [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab Deposit Account [BA]	DC	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent A					
Charles Schwab Deposit Account [BA]	DC	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent B					
Charles Schwab Deposit Account [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent C					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
EMCORE Corporation (EMKR) [ST] DESCRIPTION: Dependent child B	DC	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
EMCORE Corporation (EMKR) [ST] DESCRIPTION: Dependent child B	DC	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
EMCORE Corporation (EMKR) [ST] DESCRIPTION: Dependent child C	DC	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input checked="" type="checkbox"/>
First Trust MLP and Energy Income Fund Common Shares of Beneficial Interest (FEI) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
First Trust MLP and Energy Income Fund Common Shares of Beneficial Interest (FEI) [ST] DESCRIPTION: Dependent child A	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
First Trust MLP and Energy Income Fund Common Shares of Beneficial Interest (FEI) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
First Trust MLP and Energy Income Fund Common Shares of Beneficial Interest (FEI) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Florida Prepaid College Plan ⇒ 529 Florida Prepaid College Plan [5P] LOCATION: FL DESCRIPTION: Dependent child B		None	Tax-Deferred		<input type="checkbox"/>
Florida Prepaid College Plan ⇒ 529 Florida Prepaid College Plan [5P] LOCATION: FL DESCRIPTION: Dependent child A		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Florida Prepaid College Plan ⇒ 529 Florida Prepaid College Plan [5P] LOCATION: FL DESCRIPTION: Dependent child C		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
L.S. Starrett Company (SCX) [ST] DESCRIPTION: Dependent Child A	DC	None	Capital Gains	\$1 - \$200	<input type="checkbox"/>
L.S. Starrett Company (SCX) [ST] DESCRIPTION: Dependent Child B	DC	None	Capital Gains	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
L.S. Starrett Company (SCX) [ST] DESCRIPTION: Dependent Child C	DC	None	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Matrix Service Company (MTRX) [ST] DESCRIPTION: Dependent child B	DC	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Matrix Service Company (MTRX) [ST] DESCRIPTION: Dependent child C	DC	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Matrix Service Company (MTRX) [ST] DESCRIPTION: Dependent child A	DC	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Matrix Service Company (MTRX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
New Gold Inc. (NGD) [ST] DESCRIPTION: Dependent A	DC	\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
New Gold Inc. (NGD) [ST] DESCRIPTION: Dependent B	DC	\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
New Gold Inc. (NGD) [ST] DESCRIPTION: Dependent C	DC	\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
Nokia Corporation Sponsored American Depositary Shares (NOK) [ST] DESCRIPTION: Dependent child A	DC	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Nokia Corporation Sponsored American Depositary Shares (NOK) [ST] DESCRIPTION: Dependent child B	DC	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Nokia Corporation Sponsored American Depositary Shares (NOK) [ST] DESCRIPTION: Dependent child C	DC	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Nokia Corporation Sponsored American Depositary Shares (NOK) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Personal Residence [RP]	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Newbury, NH, US					
Quantum Corporation (QMCO) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Quantum Corporation (QTM) [ST]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Dependent Child A					
Quantum Corporation (QTM) [ST]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Dependent Child C					
Quantum Corporation (QTM) [ST]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Dependent Child B					
Richardson Electronics, Ltd. (RELL) [ST]	DC	None	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Dependent Child A					
Richardson Electronics, Ltd. (RELL) [ST]	DC	None	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Dependent Child B					
Richardson Electronics, Ltd. (RELL) [ST]	DC	None	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Dependent Child C					
SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent child A					
SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent child B					
SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent child C					
SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Florida Pension [PE]		Undetermined	None		<input type="checkbox"/>
DESCRIPTION: Defined Benefit Pension Plan. Monthly Retirement benefit at age 62 to be determined					
Wells Fargo Bank N A Checking account [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Proceeds from the sale of Home Bancce Shares deposited in account for Dependent child A and B					
Wells Fargo Bank N.A Savings Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Bank N.A Savings Account [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Bank N.A. Checking Account [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent Child A					
Wells Fargo Bank N.A. Checking Account [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent Child B					
Wells Fargo Bank N.A. Checking Account [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Dependent child C					
Wells Fargo Checking account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<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?
EMCORE Corporation (EMKR) [ST]	DC	04/19/2021	P	\$1,001 - \$15,000	
DESCRIPTION: This was a simple stock transaction.					
EMCORE Corporation (EMKR) [ST]	DC	04/19/2021	P	\$1,001 - \$15,000	
DESCRIPTION: This was a simple stock transaction.					
EMCORE Corporation (EMKR) [ST]	DC	04/19/2021	P	\$1,001 - \$15,000	
DESCRIPTION: This was a simple stock transaction.					
Quantum Corporation (QMCO) [ST]	DC	12/23/2021	P	\$1,001 - \$15,000	
Quantum Corporation (QMCO) [ST]	DC	12/23/2021	P	\$1,001 - \$15,000	
Quantum Corporation (QMCO) [ST]	DC	12/23/2021	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
Caremi Partners Ltd	Spouse salary	N/A
CCHC Partners LLC	Spouse self employment income	N/A
Community Capital Holding Corp	Spouse commissions	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Trust Bank F/K/A Suntrust Mortgage Inc.	December 2005	Mortgage on personal residence Weston FL	\$500,001 - \$1,000,000
JT	Trust Bank F/K/A Suntrust Bank	March 2005	Home Equity line of credit on personal residence Weston FL	\$250,001 - \$500,000
JT	Claremont Savings Bank	February 2017	Mortgage on personal residence Newbury NH	\$100,001 - \$250,000
JT	Claremont Savings Bank	March 2019	2nd Mortgage on personal residence Newbury NH	\$50,001 - \$100,000
JT	Claremont Savings Bank	Septmeber 2021	Mortgage on persnal residence Newbury NH	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2004	Myself and the State of Florida	Defined Benefit Pension Plan.. Monthly retirement benefit at age 62 to be determined

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

- Florida Prepaid College Plan  
LOCATION: FL
- Florida Prepaid College Plan  
LOCATION: FL
- Florida Prepaid College Plan  
LOCATION: FL

## 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. Debbie Wasserman Schultz , 08/12/2022