



Filing ID #10037723

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Jason Crow
Status: Member
State/District: CO06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|----------------------|--------------------------|--------------------|-------------------------------------|
| American BD FD of America A (ABNFX) [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| American GR FD of America A (AGTHX) [MF] | JT | \$1,001 - \$15,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| CU Retirement through TIAA ⇒ Blackrock Equity Index Fund [MF] | SP | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| CU Retirement through TIAA ⇒ Blackrock MSCI ACWI es-US Index Fund [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| CU Retirement through TIAA ⇒ Blackrock US Debt Index Fund M [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| CU Retirement through TIAA ⇒ Dodge & Cox Stock Fund (DODGX) [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| CU Retirement through TIAA ⇒ Harbor Capital Appreciation Fund Institutional Class Fund (HACAX) [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| CU Retirement through TIAA ⇒ | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|---------------------|----------------|-----------------|-------------------------------------|
| JP Morgan Sml Cp Growth R6 [MF] | | | | | |
| FirstBank of Colorado Savings Account [BA] | JT | \$15,001 - \$50,000 | Interest | \$1 - \$200 | <input checked="" type="checkbox"/> |
| FirstBank of Colorado Savings Account [BA] | DC | \$1 - \$1,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Hartford Floating Rate BD A (HFLAX) [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Hartford Floating Rate Fund C (HFLCX) [MF] | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| ISHARES CORE MSCI EAFE ETF (IEFA) [IH] | | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| ISHARES RUSSELL 2000 VALUE ETF (IWN) [IH] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| ISHARES CORE MSCI EMERGING (IEMG) [IH] | | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| ISHARES IBOXX HY COR BD ETF (HYG) [IH] | | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| ISHARES RUSSELL MIDCAP V ETF (IWS) [IH] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| ISHARES RUSSELL 1000 GRW ETF (IWF) [IH] | | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| ISHARES RUSSELL 1000 VALUE ETF (IWO) [IH] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| ISHARES RUSSELL 2000 GRWTH ETF (IWO) [IH] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| ISHARES RUSSELL MIDCAP G ETF (IWP) [IH] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Morgan Stanley Private Bank [BA] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Morgan Stanley Private Bank [IH] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| DESCRIPTION: Cash account | | | | | |
| PIMCO ENHANCED SHRT MTRT EXC (MINT) [IH] | | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Rental property [RP] | JT | \$500,001 - | Rent | \$15,001 - | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---------------------------------------|-------|---------------------|----------------|----------|-------------------------------------|
| | | \$1,000,000 | | \$50,000 | |
| LOCATION: Denver, CO, US | | | | | |
| TSP C Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| TSP F Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| TSP G Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| TSP I Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| TSP L2040 [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| TSP S Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| VANGUARD SHORT TERM BND (BSV) [IH] | | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| VANGUARD TOTAL BOND MARKET (BND) [IH] | | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" 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? |
|--|-------|------------|-------------|----------------------|-------------------------------------|
| American GR FD of America A (AGTHX) [MF] | JT | 01/28/2019 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| American GR FD of America A (AGTHX) [MF] | JT | 08/5/2019 | S (partial) | \$50,001 - \$100,000 | <input checked="" type="checkbox"/> |
| CU Retirement through TIAA ⇒ JP Morgan Sml Cap Growth R6 [MF] | SP | 05/28/2020 | P | \$15,001 - \$50,000 | |
| CU Retirement through TIAA ⇒ Voya SC Growth [MF] | SP | 05/28/2020 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| DESCRIPTION: TIAA sold this fund and purchased shares in JP Morgan Sml Cap Growth R6 | | | | | |
| ISHARES 20+ YR TREASU BOND ETF [IR] | | 05/10/2019 | P | \$15,001 - \$50,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------|---------------------|--------------------------|
| ISHARES 20+ YR TREASU BOND ETF [IR] | | 03/16/2020 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| ISHARES 20+ YR TREASU BOND ETF [IR] | | 03/18/2020 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| ISHARES CORE MSCI EAFE ETF [IR] | | 03/18/2020 | P | \$1,001 - \$15,000 | |
| ISHARES CORE MSCI EMERGING [IR] | | 05/10/2019 | P | \$15,001 - \$50,000 | |
| ISHARES CORE MSCI ETF [IR] | | 05/10/2019 | P | \$15,001 - \$50,000 | |
| ISHARES CORE MSCI JAPAN ETF [MF] | | 05/10/2019 | P | \$1,001 - \$15,000 | |
| ISHARES IBOXX HY COR BD ETF [IR] | | 04/8/2020 | P | \$1,001 - \$15,000 | |
| ISHARES IBOXX HY COR BD ETF [IR] | | 05/20/2020 | P | \$1,001 - \$15,000 | |
| ISHARES RUSSELL 1000 GRW ETF [IR] | | 05/10/2019 | P | \$15,001 - \$50,000 | |
| ISHARES RUSSELL 1000 GRW ETF [IR] | | 03/18/2020 | P | \$1,001 - \$15,000 | |
| ISHARES RUSSELL 1000 VALUE ETF [IR] | | 03/18/2020 | P | \$1,001 - \$15,000 | |
| ISHARES RUSSELL 1000 VALUE ETF (IWO) [IR] | | 03/20/2019 | P | \$15,001 - \$50,000 | |
| ISHARES RUSSELL 2000 GROWTH ETF (IWO) [MF] | | 05/10/2019 | P | \$1,001 - \$15,000 | |
| ISHARES RUSSELL 2000 VALUE ETF [IR] | | 05/10/2019 | P | \$1,001 - \$15,000 | |
| ISHARES RUSSELL 2000 VALUE ETF [IR] | | 05/20/2020 | P | \$1,001 - \$15,000 | |
| ISHARES RUSSELL MIDCAP G ETF [IR] | | 03/18/2020 | P | \$1,001 - \$15,000 | |
| ISHARES RUSSELL MIDCAP G ETF (IWP) [MF] | | 05/10/2019 | P | \$1,001 - \$15,000 | |
| ISHARES RUSSELL MIDCAP V ETF [IR] | | 05/10/2019 | P | \$1,001 - \$15,000 | |
| ISHARES RUSSELL MIDCAP V ETF [IR] | | 03/18/2020 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------|-----------------------|--------------------------|
| ISHARES TIPS BOND ETF [MF] | | 05/10/2019 | P | \$1,001 - \$15,000 | |
| ISHARES TIPS BOND ETF [IR] | | 03/16/2020 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| ISHARES TIPS BOND ETF [IR] | | 04/8/2020 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| PIMCO ENHANCED SHRT MTRT EXC [IR] | | 05/10/2019 | P | \$15,001 - \$50,000 | |
| PIMCO ENHANCED SHRT MTRT EXC [IR] | | 12/23/2019 | P | \$1,001 - \$15,000 | |
| PIMCO ENHANCED SHRT MTRT EXC [IR] | | 03/16/2020 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TD Retirement 2045 ⇒ TD Retirement 2045 [MF] | | 03/4/2019 | S | \$100,001 - \$250,000 | <input type="checkbox"/> |
| DESCRIPTION: Rollover of 401k from old employer (through Fidelity) | | | | | |
| VANGUARD SHORT TERM BND [IR] | | 12/23/2019 | P | \$1,001 - \$15,000 | |
| VANGUARD SHORT TERM BND [IR] | | 03/16/2020 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| VANGUARD SHORT TERM BND [IR] | | 05/20/2020 | P | \$1,001 - \$15,000 | |
| VANGUARD SHORT TERM BOND (BSV) [MF] | | 05/10/2019 | P | \$15,001 - \$50,000 | |
| VANGUARD TOTAL BOND MARKET [IR] | | 03/18/2020 | P | \$1,001 - \$15,000 | |
| VANGUARD TOTAL BOND MARKET [IR] | | 05/20/2020 | P | \$1,001 - \$15,000 | |
| VANGUARD TOTAL BOND MARKET (BND) [MF] | | 05/10/2019 | P | \$15,001 - \$50,000 | |

* 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 |
|------------------------|---------------|--------|
| University of Colorado | Spouse salary | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|-----------------|----------------|---|-------------------------|
| JT | JP Morgan Chase | May 2017 | Mortgage on rental property, Denver, CO | \$500,001 - \$1,000,000 |
| JT | US Bank | November 2017 | Mortgage on primary residence, Aurora, CO | \$250,001 - \$500,000 |
| JT | PennyMac | April 2020 | Mortgage on home, Summit County, CO | \$250,001 - \$500,000 |
| JT | JP Morgan Chase | September 2019 | Credit card | \$10,000 - \$15,000 |

SCHEDULE E: POSITIONS

None disclosed.

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

- CU Retirement through TIAA (Owner: SP)
- TD Retirement 2045
DESCRIPTION: Holland & Hart Retirement through Fidelity

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. Jason Crow , 08/13/2020