



Filing ID #10067895

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Sam T. Liccardo  
**Status:** Member  
**State/District:** CA16

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2024  
**Filing Date:** 05/11/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Express Savings [BA]		\$15,001 - \$50,000	Interest	Not Applicable	\$2,501 - \$5,000
Residential Property [RP]	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	\$50,001 - \$100,000
LOCATION: Imperial Beach / San Diego County, CA, US					
Vacation Property [RP]		\$1,000,001 - \$5,000,000	Rent	None	\$15,001 - \$50,000
LOCATION: Tahoe City/ Placer County, CA, US					
DESCRIPTION: Condominium owned by four siblings, and sold in November of 2024.					
CalPERS Pension Sam Liccardo ⇒ CalPERS [DB]		\$250,001 - \$500,000	Capital Gains, Interest	Not Applicable	None
Fidelity 457 ⇒ BrokerageLink ⇒ Fidelity Global Innovators Class Series A U\$ DSC (FNLIIX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity 457 ⇒ BrokerageLink ⇒ Fidelity Select Utilities Growth Portfolio (FSUTX) [MF]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity 457 ⇒ BrokerageLink ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ 92210J135 MISSIONSQ PLUS R13 [OT]  DESCRIPTION: residual Mutual Fund -- primarily treasuries		\$1,001 - \$15,000	Tax-Deferred		
Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity 457 ⇒ Santa Clara 457 Plan ⇒ Vanguard FTSE All-World ex-US Index Fund Insti Shs (VFWSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ American States Water Company Common Stock (AWR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Bank of America CD (6/2025) [BA]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Bristol-Myers Squibb Company Common Stock (BMY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Charles Schwab (2024) [BA]		\$50,001 - \$100,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Citibank (6/2025) [BA]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ FHLB (3/2030) [GS]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ FHLB (9/2026) [GS]		\$50,001 - \$100,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$100,001 - \$250,000	Tax-Deferred		

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Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ SOFI (2024) [BA]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab IRA -- Sam Liccardo ⇒ SWVXX [BA]		\$100,001 - \$250,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ First Trust NASDAQ Cybersecurity ETF (CIBR) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Invesco Water Resources ETF (PHO) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ NovoCure Limited - Ordinary Shares (NVCR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab ⇒ Schwab Roth IRA -- Sam Liccardo ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab ⇒ Schwab SEP IRA -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$15,001 - \$50,000	Interest	Not Applicable	\$201 - \$1,000

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Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	Not Applicable	\$1,001 - \$2,500
Schwab ⇒ Schwab Trading Account -- Sam Liccardo ⇒ SWVXX [BA]		\$1,001 - \$15,000	Interest	Not Applicable	\$1 - \$200
Spouse Schwab IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse Schwab IRA ⇒ Snowflake Inc. Class A Common Stock (SNOW) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab IRA ⇒ SWVXX [BA]	SP	\$50,001 - \$100,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ Arm Holdings plc - American Depository Shares (ARM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ AT&T Inc. (T) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse Schwab Roth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		

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Spouse Schwab Roth IRA ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Fidelity Select Utilities Growth Portfolio (FSUTX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Spouse Schwab SEP IRA ⇒ Sprott Physical Gold Trust ETV (PHYS) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
TreasuryDirect ⇒ Series I Savings Bond [GS]		\$15,001 - \$50,000	Interest	Not Applicable	\$1,001 - \$2,500
TreasuryDirect ⇒ Series I Savings Bonds [GS]		\$15,001 - \$50,000	Interest	Not Applicable	None
DESCRIPTION: Jessica's I-Bonds (amount TBD)					

\* Investment Vehicle 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 Current Year to Filing</b>	<b>Amount Preceding Year</b>
Westly Foundation	spouse salary	N/A	\$110,000.00

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## **SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

## **SCHEDULE A INVESTMENT VEHICLE DETAILS**

- Fidelity 457
- Schwab  
LOCATION: US
- Spouse Schwab IRA (Owner: SP)
- CalPERS Pension Sam Liccardo  
DESCRIPTION: Defined Benefit Pension for service at the City of San Jose; 16 years accrual
- Spouse Schwab SEP IRA (Owner: SP)
- Spouse Schwab Roth IRA (Owner: SP)
- TreasuryDirect  
LOCATION: US
- Schwab ⇒ Schwab IRA -- Sam Liccardo
- Schwab ⇒ Schwab Roth IRA -- Sam Liccardo
- Schwab ⇒ Schwab Trading Account -- Sam Liccardo
- Schwab ⇒ Schwab SEP IRA -- Sam Liccardo
- Fidelity 457 ⇒ Santa Clara 457 Plan
- Fidelity 457 ⇒ BrokerageLink

## **EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**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. Sam T. Liccardo , 05/11/2025