



Filing ID #10046683

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Michelle Steel
Status: Member
State/District: CA48

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 05/16/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AZ HLTH FAC Auth 040507QH1 [GS] DESCRIPTION: redeemed on 01/01/21	JT	None	Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Baird Core Plus Bond Ins BCOIX [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Bank of Hope checking #0137 [BA] DESCRIPTION: personal checking	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
Bank of Hope MMA #0467 [BA] DESCRIPTION: Personal Money Market account	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank of Hope savings #3844 [BA] DESCRIPTION: Personal savings	JT	\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>
CA Infra & E Dev BK 13034ATG5 [GS]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
California Health F 13032UQD3 [GS]	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
California St Dept 13067WRS3 [GS]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
CBB savings #2846 [BA]	JT	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: personal savings					
Columbia Dividend Income CDDRX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Energy NW WA Elec R 29270CXR1 [GS]	JT	None	Interest	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: Redeemed 07/01/21					
Energy Select Sector XLE [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Energy Select Sector XLE [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity MSCI Comm SRV FCOM [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity MSCI Comm SRV FCOM [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Small Cap Growth FCPGX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Glenmede Quant US Large GTLLX [MF]	JT	\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Hope Bancorp, Inc. (HOPE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Invesco Developing Market ODVYX [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Invesco Developing Market ODVYX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Invesco FTSE Rafi US PRFZ [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Invesco International SM OSMYX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Invesco S & P 500 Equal RSP [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Invesco S & P Emerging EELV [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Invesco S & P Invesco S & P RYF [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Invesco S & P Smallcap Low XSLV [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Investco S & P 500 Low SPLV [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Iowa Fin Auth Rev 46246K3X8 [GS]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
IShares Core S & P US IUSG [EF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
IShares MSCI EAF Min Vol EFAV [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
IShares MSCI EAFE Small SCZ [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
IShares MSCI EAFE Small SCZ [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Janus Henderson Global E HFQIX [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Janus Henderson Global L JFNIX [MF]	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Janus Henderson Global Life Sciences JFNIX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Janus Henderson Global Real Estate JERIX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Klein TX ISD 498531JQ6 [GS]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
KS ST Dept Trans 485424SA4 [GS]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Leander TX ISD 521841WF9 [GS]	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Lord Abbett Short Duration LLDYX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Massachusetts St 57582RWF9 [GS]	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
MFS International Intrin MINIX [MF]	JT	\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
MFS International Intrin MINIX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
MFS New Discovery Value NDVIX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Mineral interest rights, Odessa, TX [OT]	SP	Undetermined	Oil royalty	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: mineral interest only					
NM FA ST Trans 64711RLX2 [GS]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
OR ST Trans Hwy Tax 68607DSS5 [GS]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Pimco Income Instl PIMIX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Salt River PRJ AZ 79574CBM4 [GS]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Schwab FDMTL Intl LG CO SFNNX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Schwab Government Money Market Fund SWGXX [BA]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Schwab Government Money Market Fund SWGXX [BA]	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Schwab Government Money Market Funds SWGXX [BA]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Schwab International SCHF [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Schwab US Large Cap ETF SCHX [EF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab US Large Cap ETF SCHX [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab US Small Cap ETF SCHX [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Select Sector Industrial XLI [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Select Sector Industrial XLI [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Select Sector UTI Select XLU [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Select Str Financial XLF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Select Str Financial XLF [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SPDR Fund Consumer Discre Sel XLY [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SPDR Fund Consumer Staples XLP [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SPDR Fund Consumer XLY [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
SPDR Fund Materials XLB [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
SPDR Fund Materials XLB [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SPDR S & P 500 ETF SPY [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Starbucks Corporation (SBUX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Technology Select Sector XLK [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Tulare County Calif 89915CAJ9 [GS]	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Turlock CA IRR Dist 900190JT7 [GS]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Equity-Income A VEIRX [MF]	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Inflation-Protected VAIPX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Information VGT [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard International G VWILX [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Short-Term Inve VFSUX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wisconsin State 97705MJE6 [GS]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Wisdomtree Intl Smallcp DLS [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

* 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?
AZ Hlth Fac Auth 040507QH1 [GS] DESCRIPTION: Bond matured	JT	01/1/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
California Health F 13032UQD [GS]	JT	02/5/2021	P	\$100,001 - \$250,000	
Columbia Dividend Income Inst2 CDDRX [MF] DESCRIPTION: tax deferred	SP	08/18/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Doubleline Total Return Bond DBLTX [MF] DESCRIPTION: tax deferred	SP	08/18/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Doubleline Total Return Bond DBLTX [MF] DESCRIPTION: tax deferred	SP	08/18/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
Energy NW WA Elec R [GS] DESCRIPTION: Bond matured	JT	07/1/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Glenmede Quant US Large Cap GR EQ GTLLX [MF] DESCRIPTION: tax deferred	SP	08/18/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Glenmede Quant US Large Cap GR EQ GTLLX [MF] DESCRIPTION: tax deferred	SP	08/18/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Invesco S & P Emerging Volatility EELV [EF] DESCRIPTION: tax deferred	SP	08/18/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
IShares MSCI EAF MIN VOLFCT EFAV [EF] DESCRIPTION: tax deferred	SP	08/18/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Janus Henderson Global Equity Income HFQIX [MF] DESCRIPTION: tax deferred	SP	08/18/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Janus Henderson Global Equity Income HFQIX [EF] DESCRIPTION: tax deferred	SP	08/18/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
San Diego Ca PFA SW 79730AJL3 [GS]	JT	08/4/2021	P	\$50,001 - \$100,000	
Schwab FDMLT Intl LG Co [MF] DESCRIPTION: tax deferred	SP	12/17/2021	P	\$1,001 - \$15,000	
Schwab US Large Cap SCHG [GS] DESCRIPTION: tax deferred	SP	08/18/2021	P	\$1,001 - \$15,000	

* 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
County of Orange, Ca	Supervisor	\$11,720.00
OCTA	Member Stipend	\$185.00
Shawn Steel Law Firm	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Docenmuehle Mortgage	March 2012	personal residence mortgage	\$500,001 - \$1,000,000

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.

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. Michelle Steel , 05/16/2022