



Filing ID #10053963

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Young Kim
Status: Member
State/District: CA40

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 05/15/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|----------------------|----------------|--------|--------------------------|
| AIG Life Insurance ⇒ AIG Life Insurance [WU] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ Brokerage Sweep Account [BA] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA Emerging Markets Core [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA Global Real Estate [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA International Core Equity [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA International Small [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA International Value [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA Intl Hi Relativ Profitability [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|--------------|-----------------------|-----------------------|---------------|--------------------------|
| Charles Schwab IRA ⇒ DFA Investment Grade [MF] | | \$50,001 - \$100,000 | | Tax-Deferred | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA Short Term Extended Quality Port [MF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA Short-Duration Real [MF] | | \$1,001 - \$15,000 | | Tax-Deferred | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA US Core Equity 2 [MF] | | \$50,001 - \$100,000 | | Tax-Deferred | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA US Hi Relativ Profitability [MF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA US Large Cap Value [MF] | | \$1,001 - \$15,000 | | Tax-Deferred | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA US Small Cap [MF] | | \$1,001 - \$15,000 | | Tax-Deferred | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA US Targeted Value [MF] | | \$15,001 - \$50,000 | | Tax-Deferred | <input type="checkbox"/> |
| Mass Mutual ⇒ Mass Mutual (Fixed Annuity) [FN] | | \$1,001 - \$15,000 | | Tax-Deferred | <input type="checkbox"/> |
| DESCRIPTION: Tax sheltered annuity | | | | | |
| Wells Fargo Bank [BA] | JT | \$100,001 - \$250,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: Personal checking & savings | | | | | |

* 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? |
|--|--------------|-------------|-----------------|--------------------|-------------------------------|
| Charles Schwab IRA ⇒ DFA Emerging Markets Core [MF] | | 03/1/2022 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------------|--------------------|--------------------------|
| Charles Schwab IRA ⇒ DFA Emerging Markets Core [MF] | | 05/23/2022 | P | \$1,001 - \$15,000 | |
| Charles Schwab IRA ⇒ DFA Emerging Markets Core [MF] | | 11/1/2022 | P | \$1,001 - \$15,000 | |
| Charles Schwab IRA ⇒ DFA Global Real Estate [MF] | | 04/6/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA Global Real Estate [MF] | | 10/12/2022 | P | \$1,001 - \$15,000 | |
| Charles Schwab IRA ⇒ DFA International Value [MF] | | 05/23/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA Intl Hi Relativ Profitability [MF] | | 09/6/2022 | P | \$1,001 - \$15,000 | |
| Charles Schwab IRA ⇒ DFA Investment Grade [MF] | | 02/1/2022 | P | \$1,001 - \$15,000 | |
| Charles Schwab IRA ⇒ DFA Investment Grade [MF] | | 03/22/2022 | P | \$1,001 - \$15,000 | |
| Charles Schwab IRA ⇒ DFA Investment Grade [MF] | | 04/6/2022 | P | \$1,001 - \$15,000 | |
| Charles Schwab IRA ⇒ DFA Investment Grade [MF] | | 10/12/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA US Core Equity 2 [MF] | | 09/6/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA US Core Equity 2 [MF] | | 11/1/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ DFA US Core Equity 2 [MF] | | 12/12/2022 | P | \$1,001 - \$15,000 | |
| Charles Schwab IRA ⇒ DFA US Large Cap Value [MF] | | 03/22/2022 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Charles Schwab IRA ⇒ | | 03/1/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|-----------|----------------|--------------------|--------------------------|
| DFA US Targeted Value [MF] | | | | (partial) | |
| Charles Schwab IRA ⇒ DFA US Targeted Value [MF] | | 11/1/2022 | S (partial) | \$1,001 - \$15,000 | <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 C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|------------|---------------|----------|-----------------------|
| JT | Loan Depot | March 2019 | Mortgage | \$250,001 - \$500,000 |

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

| Source | Trip Details | | | | Inclusions | | |
|--|--------------|------------|--|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | Start Date | End Date | Itinerary | Days at Own Exp. | Lodging? | Food? | Family? |
| U.S. Association of Former Members of Congress (FMC) | 07/4/2022 | 07/10/2022 | Los Angeles, CA - Seoul, South Korea - Los Angeles, California | 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

- AIG Life Insurance
DESCRIPTION: Whole Life Insurance Cash Accumulated Value
- Charles Schwab IRA
- Mass Mutual
LOCATION: US

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. Young Kim , 05/15/2023