



Filing ID #10057006

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Jamil O. Chaudhry-Ahmad
Status: Congressional Candidate
State/District: OR01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 04/14/2024
Period Covered: 01/01/2023– 03/22/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401k #11 ⇒ NON40O32T BTC S&P 500 INDEX [OT] DESCRIPTION: NON40O32T BTC S&P 500 INDEX		\$50,001 - \$100,000	None		
401k #12 ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$500,001 - \$1,000,000	None		
401k #21 ⇒ NON40O32T BTC S&P 500 INDEX [OT] DESCRIPTION: NON40O32T BTC S&P 500 INDEX		\$50,001 - \$100,000	None		
401k #22 ⇒ NON40O32R BTC S&P 500 INDEX [OT] DESCRIPTION: NON40O32R BTC S&P 500 INDEX		\$100,001 - \$250,000	None		
529 #11 ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares (VSMPX) [MF]		\$15,001 - \$50,000	None		
529 #41 ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares (VSMPX) [MF]		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 #42 ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares (VSMPX) [MF]		\$1 - \$1,000	None		
529 #51 ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares (VSMPX) [MF]		\$15,001 - \$50,000	None		
529 #52 ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares (VSMPX) [MF]		\$1 - \$1,000	None		
Brokerage #11 ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Brokerage #11 ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$50,001 - \$100,000	Dividends	None	\$201 - \$1,000
Brokerage #12 ⇒ CUSIP: 937440FL4 [GS] DESCRIPTION: Municipal Bond OID		\$1,001 - \$15,000	None		
Brokerage #12 ⇒ Intel Corporation - Common Stock (INTC) [ST]		\$25,000,001 - \$50,000,000	Dividends	\$1 - \$200	\$201 - \$1,000
Brokerage #12 ⇒ Intel Corporation RSUs [RS]		\$100,001 - \$250,000	None		
Brokerage #12 ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Brokerage #12 ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Brokerage #12 ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$50,001 - \$100,000	Dividends	None	\$201 - \$1,000
Brokerage #31 ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Brokerage #31 ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Brokerage #32 ⇒ CUSIP: 034825ZU6 [GS] DESCRIPTION: Municipal Bond		\$1,001 - \$15,000	Interest	None	\$1 - \$200
Brokerage #32 ⇒ CUSIP: 408072JF4 [GS] DESCRIPTION: Municipal Bond		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Brokerage #32 ⇒ CUSIP: 625517KN6 [GS] DESCRIPTION: Municipal Bond		\$1,001 - \$15,000	Interest	None	\$1 - \$200
Brokerage #32 ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Brokerage #32 ⇒ Fidelity Total Market Index Fund (FZROX) [MF]		\$100,001 - \$250,000	Dividends	None	\$1,001 - \$2,500
Brokerage #32 ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Brokerage #41 ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Brokerage #41 ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$50,001 - \$100,000	Dividends	None	\$201 - \$1,000
Brokerage #41 ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage #41 ⇒ SPDR Portfolio S&P 1500 Composite Stock Market ETF (SPTM) [EF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Brokerage #51 ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Brokerage #51 ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Brokerage #51 ⇒ SPDR Portfolio S&P 1500 Composite Stock Market ETF (SPTM) [EF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Coverdell #41 ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	None
Coverdell #51 ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	None
First Tech Federal Credit Union (Hillsboro, OR) Accounts [BA]		\$1,001 - \$15,000	Interest	None	None
HSA #11 ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$50,001 - \$100,000	None		
HSA #11 ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$15,001 - \$50,000	None		
HSA #21 ⇒ CUSIP: 912797JMo [GS]		\$1,001 - \$15,000	None		
Intel Corporation Pension [PE] DESCRIPTION: Absolutely zero value.		None	None		
IRA #11 ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]		\$50,001 - \$100,000	Dividends	\$1 - \$200	None
IRA #12 ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$15,001 - \$50,000	None		
IRA #21 ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$50,001 - \$100,000	None		
Secure Storage ⇒ Gold [PM]		\$1,001 - \$15,000	None		
Secure Storage ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Platinum [PM]					
Secure Storage ⇒ Silver [PM]		\$1,001 - \$15,000	None		

* 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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Intel Corporation	Salary	\$63,394.54	\$160,271.56

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

<ul style="list-style-type: none">◦ 401k #11◦ 401k #12◦ 401k #21◦ 401k #22◦ 529 #11 LOCATION: OR◦ 529 #41 LOCATION: OR◦ 529 #42 LOCATION: OR◦ 529 #51 LOCATION: OR

- 529 #52
LOCATION: OR
- Brokerage #11
- Brokerage #12
- Brokerage #31
- Brokerage #32
- Brokerage #41
- Brokerage #51
- Coverdell #41
- Coverdell #51
- HSA #11
- HSA #21
- IRA #11
- IRA #12
- IRA #21
- Secure Storage (100% Interest)
LOCATION: US

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: Jamil O. Chaudhry-Ahmad , 04/14/2024