



Filing ID #10042473

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Marilyn Strickland
Status: Member
State/District: WA10

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2020
Filing Date: 08/13/2021
Period Covered: 01/01/2019– 12/31/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
America's Credit Union Certificate of Deposit [BA]		\$50,001 - \$100,000	Dividends	Not Applicable	\$201 - \$1,000
Banner Bank Account [BA]	SP	\$15,001 - \$50,000	None		
Cetera Brokerage Account ⇒ American Funds Investment Company of America® Class A (AIVSX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Cetera Brokerage Account ⇒ Bank Deposit [BA]		\$50,001 - \$100,000	Interest	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ Bridge Builder Core Plus Bond Fund (BBCPX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$201 - \$1,000
Edward Jones Brokerage Account ⇒ Bridge Builder International Equity Fund (BBIEX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ Bridge Builder Large Cap Growth Fund (BBGLX)		\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[MF]					
Edward Jones Brokerage Account ⇒ Bridge Builder Large Cap Value Fund (BBVLX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ Bridge Builder Small/Mid Cap Growth Fund (BBGSX) [MF]		\$1,001 - \$15,000	Capital Gains	Not Applicable	\$201 - \$1,000
Edward Jones Brokerage Account ⇒ Bridge Builder Small/Mid Cap Value Fund (BBVSX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ Federated Hermes Institutional High Yield Bond Fund Class R6 (FIHLX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ iShares Core US Aggregate Bond (AGG) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ JPMorgan Emerging Markets Equity Fund Class R6 (JEMWX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ Oakmark International Fund Investor Class (OAKIX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ SPDR Dow Jones Global Real Estate ETF (RWO) [EF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ TCW Emerging Markets Income Fund Class Plan P (TGEPX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ Vanguard Growth Index Fund ETF (VUG) [EF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ Vanguard Large Cap ETF (VV) [EF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Edward Jones Brokerage Account ⇒ Vanguard Small Cap ETF (VB) [EF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones Brokerage Account ⇒ Vanguard Value Index Fund ETF (VTV) [EF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Edward Jones IRA ⇒ Bridge Builder Core Plus Bond Fund (BBCPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Bridge Builder International Equity Fund (BBIEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Bridge Builder Large Cap Growth Fund (BBGLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Bridge Builder Large Cap Value Fund (BBVLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Bridge Builder Small/Mid Cap Growth Fund (BBGSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Bridge Builder Small/Mid Cap Value Fund (BBVSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Federated Hermes Institutional High Yield Bond Fund Class R6 (FIHLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ iShares Core US Aggregate Bond (AGG) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ JPMorgan Emerging Markets Equity Fund Class R6 (JEMWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Oakmark International Fund Investor Class (OAKIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ SPDR Dow Jones Global Real Estate ETF (RWO) [EF]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Edward Jones IRA ⇒ TCW Emerging Markets Income Fund Class Plan P (TGEPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Vanguard Growth Index Fund ETF (VUG) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Vanguard Large Cap ETF (VV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Vanguard Small Cap ETF (VB) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones IRA ⇒ Vanguard Value Index Fund ETF (VTY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
GESA Credit Union [BA]	SP	\$15,001 - \$50,000	Interest	Not Applicable	\$1 - \$200
Key Bank [BA]		\$100,001 - \$250,000	Interest	Not Applicable	\$1 - \$200
New York Life Adjustable Life Insurance [WU]		\$15,001 - \$50,000	None		
New York Life Whole Life Insurance [WU]		\$15,001 - \$50,000	None		
Seattle Metropolitan Chamber of Commerce 401(k) Plan ⇒ American Funds 2025 Target Date Retirement Fund® Class R-6 (RFDTX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Standard Life Insurance [WU]	SP	\$1,001 - \$15,000	None		
Tacoma Employee Retirement System [DB]		\$100,001 - \$250,000	None		
TIAA State Board Retirement Plan ⇒ TIAA-CREF Lifecycle 2025 Fund Retirement Class (TCLFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Washington State Teachers Retirement System	SP	\$500,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Defined Benefit Plan [DB]		\$1,000,000			

* 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 Current Year to Filing	Amount Preceding Year
Tacoma Public Schools	Spouse Salary	N/A	N/A
Seattle Metropolitan Chamber of Commerce	Salary	N/A	\$35,446.54

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo Bank	2004	Mortgage	\$50,001 - \$100,000
SP	Movement Mortgage	June 2020	Mortgage on Primary Residence	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Annie Wright Schools
COMMENTS:	Resigned 01/01/2021
Trustee	Urban Land Institute

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Cetera Brokerage Account
LOCATION: US

- Edward Jones Brokerage Account
LOCATION: US
- Edward Jones IRA
- Seattle Metropolitan Chamber of Commerce 401(k) Plan
- TIAA State Board Retirement Plan

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. Marilyn Strickland , 08/13/2021