



Filing ID #10052746

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Mike Levin  
**Status:** Member  
**State/District:** CA49

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 05/8/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity IRA ⇒ Fidelity Capital & Income Fund (FAGIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA ⇒ Fidelity Freedom 2040 Fund (FFFFX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity IRA ⇒ Fidelity International Sustainability Index Fund (FNIDX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity IRA ⇒ Fidelity OTC Portfolio (FOCPX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity IRA ⇒ Fidelity Real Estate Income Fund (FRIFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA ⇒ Fidelity Select Biotechnology Portfolio (FBIOX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA ⇒ Fidelity Select Environmental and Alternative Energy Portfolio		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
(FSLEX) [MF]					
Fidelity IRA ⇒ Fidelity Sustainability Bond Index Fund (FNDSX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Freedom 2040 Fund (FFFFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
US Bank Accounts [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard 529 #1 ⇒ Vanguard Aggressive Growth Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 #1 ⇒ Vanguard Growth Index Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 #1 ⇒ Vanguard Mid-Cap Index Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 #2 ⇒ Vanguard Aggressive Growth Portfolio [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 #2 ⇒ Vanguard Growth Index Portfolio [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 #2 ⇒ Vanguard Mid-Cap Index Portfolio [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		<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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	01/21/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	02/3/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒	SP	02/18/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Freedom Blend 2040 Fund (FHARX) [MF]					
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	03/3/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	03/18/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	04/5/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	04/20/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	04/21/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	05/4/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	05/18/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	06/3/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	06/21/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	07/6/2022	P	\$1,001 - \$15,000	
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	07/20/2022	P	\$1,001 - \$15,000	
Fidelity IRA ⇒ FID Intl Sustainability Index Fund (FNIDX) [MF]		12/16/2022	P	\$1,001 - \$15,000	
Fidelity IRA ⇒ Fidelity Environment & Alternative Energy (FSLEX) [MF]		12/16/2022	P	\$1,001 - \$15,000	
Fidelity IRA ⇒ Fidelity Freedom 2040 (FFFFX) [MF]	SP	05/6/2022	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity IRA ⇒ Fidelity Freedom 2040 (FFFFX) [MF]	SP	12/29/2022	P	\$1,001 - \$15,000	
Fidelity IRA ⇒ Fidelity OTC Port (FOCPX) [MF]	SP	09/9/2022	P	\$1,001 - \$15,000	

\* 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
Irvine Company	Spouse Salary	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Mr. Cooper	September 2020	Mortgage on Primary Residence	\$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

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Education Foundation (AIEF)	02/19/2022	02/27/2022	San Diego, CA - Tel Aviv, Israel - San Diego, CA	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**

- Fidelity 401(k) (Owner: SP)
- Fidelity IRA
- Fidelity IRA (Owner: SP)
- Fidelity Roth IRA (Owner: SP)
- Vanguard 529 #1 (Owner: DC)  
LOCATION: NV
- Vanguard 529 #2 (Owner: DC)  
LOCATION: NV

**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. Mike Levin , 05/8/2023