



Filing ID #10050631

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Anthony Brown  
**Status:** Former Member  
**State/District:** MD04

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2021  
**Filing Date:** 01/14/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity 500 Index Fund [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Education Savings Plan ⇒ NH College Port. (Fidelity Index) [5P] LOCATION: NH		None	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity Education Savings Plan ⇒ NH Fidelity 500 Index [5P] LOCATION: NH		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity IRA Account ⇒ Fidelity 500 Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity IRA Account ⇒ Invesco QQQ TR Unit Ser 1 [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity Rollover IRA ⇒ FIDELITY NASDAQ COMPOSITE INDEX [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity Rollover IRA ⇒ iShares Core S&P Total US Stock [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Invesco QQQ TR Unit Ser 1 [EF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
iShares Core S&P Total US Stock [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Kaiser Permanente Salaried Retirement Plan [DB]		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred asset to Fidelity Rollover IRA					
Maryland Employees' Pension System - Alternate Contributory Benefit [DB]		Undetermined	None		<input type="checkbox"/>
Maryland Legislative Pension [DB]		Undetermined	Pension Annuity	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Pension for service in Maryland General Assembly					
USAA Checking and Savings Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<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 500 Index Fund [MF]		01/27/2021	P	\$1,001 - \$15,000	
Fidelity 500 Index Fund [MF]		02/3/2021	P	\$1,001 - \$15,000	
Fidelity Education Savings Plan ⇒ NH College Port. (Fidelity Index) [5P]		01/5/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
LOCATION: NH					
Fidelity Education Savings Plan ⇒ NH College Port. (Fidelity Index) [5P]		01/25/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
LOCATION: NH					
Fidelity Education Savings Plan ⇒ NH College Port. (Fidelity Index) [5P]		01/27/2021	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LOCATION: NH					
Fidelity Education Savings Plan ⇒ NH Fidelity 500 Index [5P]		01/27/2021	P	\$100,001 - \$250,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LOCATION: NH					
Fidelity Education Savings Plan ⇒ NH Fidelity 500 Index [5P]		02/16/2021	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LOCATION: NH					
Fidelity IRA Account ⇒ Fidelity 500 Index Fund [MF]		02/25/2021	P	\$1,001 - \$15,000	
Fidelity IRA Account ⇒ Invesco QQQ TR Unit Ser 1 [EF]		01/26/2021	P	\$1,001 - \$15,000	
Fidelity Rollover IRA ⇒ FIDELITY NASDAQ COMPOSITE INDEX [MF]		03/2/2021	P	\$15,001 - \$50,000	
Fidelity Rollover IRA ⇒ iShares Core S&P Total US Stock [EF]		03/2/2021	P	\$15,001 - \$50,000	
Invesco QQQ TR Unit Ser 1 [EF]		02/25/2021	P	\$50,001 - \$100,000	
Invesco QQQ TR Unit Ser 1 [EF]		09/10/2021	P	\$1,001 - \$15,000	
Invesco QQQ TR Unit Ser 1 [EF]		05/7/2021	P	\$1,001 - \$15,000	
Invesco QQQ TR Unit Ser 1 [EF]		01/26/2021	P	\$1,001 - \$15,000	
Invesco QQQ TR Unit Ser 1 [EF]		07/2/2021	P	\$1,001 - \$15,000	
iShares Core S&P Total US Stock [EF]		02/25/2021	P	\$1,001 - \$15,000	
iShares Core S&P Total US Stock [EF]		08/2/2021	P	\$1,001 - \$15,000	
iShares Core S&P Total US Stock [EF]		08/5/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares Core S&P Total US Stock [EF]		04/5/2021	P	\$1,001 - \$15,000	
iShares Core S&P Total US Stock [EF]		05/7/2021	P	\$1,001 - \$15,000	
iShares Core S&P Total US Stock [EF]		01/26/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares Core S&P Total US Stock [EF]		03/10/2021	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
Adventist Healthcare	Spouse salary	N/A
Prince George's County Retirees Pension	Spouse salary	N/A
Maryland Legislative Pension	Pension income	\$503.30

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wintrust Mortgage	March 2021	Mortgage on primary residence	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2007	State of Maryland	Participation in Legislative Pension System
January 2015	State of Maryland	Participation in Employees' Pension System - Alternate Contributory Benefit
September 2009	Kaiser Permanente	Alternative Beneficiary in Defined Benefit Pension

## 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.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Fidelity Education Savings Plan  
LOCATION: NH
- Fidelity IRA Account
- Fidelity Rollover IRA

## 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. Anthony Brown , 01/14/2023