



Filing ID #10052705

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Derek Kilmer
Status: Member
State/District: WA06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 07/21/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Capital Income Cl A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Formerly known as Capital Income Builder Fund Cl A					
American Capital Income Cl A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Formerly known as Capital Income Builder Fund CLA					
American Capital World Bond [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
American Capital World Bond [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Core Plus Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder Core Plus Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder INTL Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder INTL Equity [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Large Growth [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bridge Builder Large Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Large Value [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Large Value [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Smallmid Growth [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Smallmid Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Smallmid Value [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder SMallmid Value [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Clgam 529 College 2024A [5P]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
LOCATION: WA					
Clgam 529 College 2024C [5P]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
LOCATION: WA					
Clgam 529 College 2027A [5P]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
LOCATION: WA					
Clgam 529 College 2027C [5P]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
LOCATION: WA					
Dfa INTL Small Company I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Dfa INTL Small Company I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones Insured Bank Money Market [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Edward Jones Retirement Money Market [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Retirement Money Market [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Edward Jones ROTH ⇒ Roth IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: American Capital Income Builder (CAIBX) is the one asset listed under this Roth IRA (and is also listed under schedule A)					
Edward Jones ROTH ⇒ Roth IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: American Capital Income Builder (CAIBX) is the one asset listed under this Roth IRA (and is also listed under schedule A)					
Federated Instl HI-Yld BD R6 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Federated Instl HI-Yld BD R6 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Goldman FS Government I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Goldman FS Government I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: purchase					
iShares Core US Aggregate Bond [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Core US Aggregate Bond [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares MSCI EAFE Small Cap Et [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares MSCI EAFE SMall Cap Et [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM Emerging Markets Equity R6 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM Emerging Markets Equity R6 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Kitsap Bank Checking [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
McKinsey & Co. Profit Sharing Retirement Plan and Money Purchase Pension Plan [PE]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Defined contribution plan. Target Retirement 2040					
NC Property [RP]	SP	\$50,001 - \$100,000	Rent	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Sunset Beach, NC, US					
Oakmark International R6 [MF]	SP	None		Tax-Deferred	<input checked="" type="checkbox"/>
Oakmark International R6 [MF]		None		Tax-Deferred	<input checked="" type="checkbox"/>
Spdr Dj Global Real Estate ETF [EF]		None		Tax-Deferred	<input checked="" type="checkbox"/>
Spdr Dj Global Real Estate ETF [EF]	SP	None		Tax-Deferred	<input checked="" type="checkbox"/>
Tcw Emerg Mkts Income Plan P [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Tcw Emerg Mkts Income Plan P [MF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Vanguard FTSE Developed Markets ETF [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Vanguard FTSE Developed Markets ETF [EF]	SP	\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
Vanguard FTSE Emerging Mkt ETF [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Vanguard FTSE Emerging MKT ETF [EF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Vanguard Growth ETF [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Vanguard Growth ETF [EF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Vanguard Large Cap ETF [EF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Vanguard Large Cap ETF [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Vanguard Small Cap ETF [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Vanguard Small Cap ETF [EF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Vanguard Value ETF [EF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Value ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
WA State PERS Plan 2 [DB]	SP	Undetermined	None		<input type="checkbox"/>
DESCRIPTION: Defined benefit plan					
WA State PERS Plan 2 [DB]		Undetermined	None		<input type="checkbox"/>
DESCRIPTION: Defined benefit plan					

* 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?
American Capital World Bond [MF]	SP	11/8/2022	P	\$1,001 - \$15,000	
American Capital World Bond [MF]		11/8/2022	P	\$1,001 - \$15,000	
Bridge Builder INTL Equity [MF]	SP	11/9/2022	P	\$1,001 - \$15,000	
Bridge Builder INTL Equity [MF]	SP	11/8/2022	P	\$1,001 - \$15,000	
Bridge Builder INTL Equity [MF]	SP	03/24/2022	P	\$1,001 - \$15,000	
Bridge Builder INTL Equity [MF]		11/9/2022	P	\$1,001 - \$15,000	
Bridge Builder INTL Equity [MF]		11/8/2022	P	\$1,001 - \$15,000	
Bridge Builder INTL Equity [MF]		03/28/2022	P	\$1,001 - \$15,000	
Bridge Builder Large Growth [MF]	SP	11/9/2022	P	\$1,001 - \$15,000	
Bridge Builder Large Growth [MF]		11/9/2022	P	\$1,001 - \$15,000	
Bridge Builder Large Value [MF]	SP	11/8/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bridge Builder Large Value [MF]		11/8/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Bridge Builder Smallmid Growth [MF]	SP	03/24/2022	P	\$1,001 - \$15,000	
Bridge Builder Smallmid Growth [MF]		03/28/2022	P	\$1,001 - \$15,000	
Bridge Builder Smallmid Value [MF]	SP	03/24/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bridge Builder Smallmid Value [MF]		03/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Oakmark International R6 [MF]	SP	11/9/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Oakmark International R6 [MF]		11/9/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Oakmark International R6 [MF]		11/9/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Spdr Dj Global Real Estate [EF]	SP	03/24/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Spdr Dj Global Real Estate [EF]		03/28/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Tcw Emerging Mkts Income Plan P [MF]	SP	11/8/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Tcw Emerging Mkts Income Plan P [MF]		11/8/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Emerging Mkt ETF [EF]	SP	03/24/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Emerging Mkt ETF [EF]		03/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard FTSE Developed Markets ETF [EF]	SP	11/8/2022	P	\$1,001 - \$15,000	
Vanguard FTSE Developed Markets ETF [EF]		11/8/2022	P	\$1,001 - \$15,000	
Vanguard Growth ETF [EF]	SP	11/8/2022	P	\$1,001 - \$15,000	
Vanguard Growth ETF [EF]	SP	03/24/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Growth ETF [EF]		03/28/2022	P	\$1,001 - \$15,000	
Vanguard Large Cap ETF [EF]	SP	03/24/2022	P	\$1,001 - \$15,000	
Vanguard Large Cap ETF [EF]		03/28/2022	P	\$1,001 - \$15,000	
Vanguard Small Cap ETF [EF]	SP	03/24/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Small Cap ETF [EF]		03/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Value ETF [EF]	SP	11/8/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Value ETF [EF]		11/8/2022	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

Source	Type	Amount
State of Washington`	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Chase Bank	August 2019	Credit Card	\$10,000 - \$15,000
JT	US Bank	October 2020	Home Mortgage	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2005	State of Washington	Public Employees Retirement System Plan 2. PERS Plan 2 is a defined benefit plan. When you meet plan requirements and retire, you are guaranteed a monthly benefit based on earned service credit and compensation while a member of PERS Plan 2.
October 1999	McKinsey and Company Profit Sharing Retirement/Pension Plan	Retirement plan managed for McKinsey and Co. by Alight. The Plan is a Defined Contribution occupational pension plan operated for the exclusive purpose of providing retirement benefits and death benefits to eligible participants and beneficiaries. I am no longer contributing to the plan. It has a retirement target date of 2040.

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

- Edward Jones ROTH

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

COMMENTS

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. Derek Kilmer , 07/21/2023