



Filing ID #10059789

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Dave Min  
**Status:** Congressional Candidate  
**State/District:** CA47

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 08/9/2024  
**Period Covered:** 01/01/2023– 07/14/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
403b ⇒ NON40OJAQ (UC Bond Fund) [MF]		\$15,001 - \$50,000	None		
403b ⇒ NON40OJMG (UC DOM EQ INDEX) [MF]		\$15,001 - \$50,000	None		
403b ⇒ NON40OJMH [MF]		\$50,001 - \$100,000	None		
403b ⇒ NON40OJNX (UC PATHWAY 2040) [MF]		\$1,001 - \$15,000	None		
403b ⇒ NON40OR8o (UC SOCIAL EQUITY) [MF]		\$15,001 - \$50,000	None		
403b ⇒ NON40OR83 (UC EMRG MKTS EQUITY) [MF]		\$15,001 - \$50,000	None		
529 plans [5P]		\$250,001 - \$500,000	None		
LOCATION: NY					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Checking and Savings Accounts [BA]		\$250,001 - \$500,000	Interest	\$1 - \$200	\$1 - \$200
FIDELITY BLUE CHIP GROWTH ETF [EF]		\$15,001 - \$50,000	None		
Fidelity Fundamental Large Cap Core ETF (FFLC) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	None
FIDELITY MSCI COMMUNICATION SERVICES INDEX ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
First Solar, Inc. (FSLR) [ST]		\$15,001 - \$50,000	None		
INVESCO EXCH TRADED FD TR II S&P GBL WATER [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
INVESCO EXCH TRADED FD TR II SOLAR ETF [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	None
ISHARES TR GL CLEAN ENE ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Sacramento home [RP]  LOCATION: Sacramento, CA, US		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Traditional IRA ⇒ FIDELITY GOVERNMENT MONEY MARKET [BA]		\$1,001 - \$15,000	None		
Traditional IRA ⇒ ISHARES TR GL CLEAN ENE ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Traditional IRA ⇒ LOOMIS SAYLES BOND RETAIL SHARES [MF]		\$1,001 - \$15,000	None		
UC DCP ⇒ NON4oOJNX (UC PATHWAY 2o4o) [MF]		\$1,001 - \$15,000	None		
UTMA DC1 ⇒ FIDELITY BLUE CHIP GROWTH ETF [EF]		\$1,001 - \$15,000	None		
UTMA DC1 ⇒ Fidelity Fundamental Large Cap Core ETF (FFLC) [EF]		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UTMA DC <sub>1</sub> ⇒ Fidelity Fundamental Large Cap Growth ETF (FFLG) [EF]		\$1,001 - \$15,000	None		
UTMA DC <sub>1</sub> ⇒ FIDELITY MSCI COMMUNICATION SERVICES INDEX ETF [EF]		\$1 - \$1,000	None		
UTMA DC <sub>1</sub> ⇒ FIDELITY SUSTAINABLE US EQUITY ETF [EF]		\$1,001 - \$15,000	None		
UTMA DC <sub>2</sub> ⇒ FIDELITY BLUE CHIP GROWTH ETF [EF]		\$1,001 - \$15,000	None		
UTMA DC <sub>2</sub> ⇒ Fidelity Fundamental Large Cap Core ETF (FFLC) [EF]		\$1 - \$1,000	None		
UTMA DC <sub>2</sub> ⇒ Fidelity Fundamental Large Cap Growth ETF (FFLG) [EF]		\$1,001 - \$15,000	None		
UTMA DC <sub>2</sub> ⇒ FIDELITY MSCI COMMUNICATION SERVICES INDEX ETF [EF]		\$1 - \$1,000	None		
UTMA DC <sub>2</sub> ⇒ FIDELITY SUSTAINABLE US EQUITY ETF [EF]		\$1,001 - \$15,000	None		
UTMA DC <sub>3</sub> ⇒ FIDELITY BLUE CHIP GROWTH ETF [EF]		\$1 - \$1,000	None		
UTMA DC <sub>3</sub> ⇒ Fidelity Fundamental Large Cap Core ETF (FFLC) [EF]		\$1 - \$1,000	None		
UTMA DC <sub>3</sub> ⇒ Fidelity Fundamental Large Cap Growth ETF (FFLG) [EF]		\$1 - \$1,000	None		
UTMA DC <sub>3</sub> ⇒ FIDELITY MSCI COMMUNICATION SERVICES INDEX ETF [EF]		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UTMA DC3 ⇒ FIDELITY SUSTAINABLE US EQUITY ETF [EF]		\$1 - \$1,000	None		
Zoom Video Communications, Inc. - Class A (ZM) [ST]		\$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
State of California	Salary	N/A	\$101,213.00
The Angelina Jolie Family Trust	Spouse consulting	N/A	\$90,926.00
University of California	Spouse salary	N/A	\$276,815.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	JP Morgan Chase	December 2020	Home mortgage on second home, used partially for residency and partially for rental income	\$500,001 - \$1,000,000
JT	Mr. Cooper	October 2012	Mortgage on principal home	\$250,001 - \$500,000
JT	Toyota Financial Services	June 2021	Car loan	\$15,001 - \$50,000

### 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

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- 403b
- Traditional IRA
- UC DCP
- UTMA DC1
- UTMA DC2
- UTMA DC3

## 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:** Dave Min , 08/9/2024