



Filing ID #10062630

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Ruben Gallego
Status: Member
State/District: AZ03

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2022
Filing Date: 08/13/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-------------------------|----------------|---------------------|-------------------------------------|
| Aspiration Checking Account [BA] | | \$1 - \$1,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Aspiration Fund Adviser LLC [PS] | | \$15,001 - \$50,000 | None | | <input type="checkbox"/> |
| DESCRIPTION: Investment Advisory Services; Location: Marina Del Rey, CA. | | | | | |
| Chase Bank Checking Account [BA] | SP | \$1 - \$1,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| IRA Club ⇒ NameCoach Inc. [CS] | | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| DESCRIPTION: Convertible Note. Pronunciation Guide Services; Location: Palo Alto, CA. | | | | | |
| National Association of Realtors 401K ⇒ T Rowe Price Retirement 2055 Fund (TRRNX) [PE] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| National Association of Realtors Pension Plan [DB] | SP | Undetermined | None | | <input type="checkbox"/> |
| Rental of Real Property [RP] | JT | \$500,001 - \$1,000,000 | Rent | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Phoenix, AZ, US DESCRIPTION: Member rented his primary residence for a total of \$19,802.05 | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|--------------------|----------------|-------------|--------------------------|
| UBS Simple IRA ⇒ JP Morgan Smart Retirement Fund 2055 (JFFCX) [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| United Services Auto Association Checking Account [BA] | | \$1 - \$1,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |

* 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 B: TRANSACTIONS

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|----------|---------------------|--------------------------|
| Aspiration Redwood Fund [MF] | | 07/24/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Aspiration Redwood Fund [MF] | | 01/30/2022 | P | \$1,001 - \$15,000 | |
| Aspiration Redwood Fund [MF] | | 01/11/2022 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| NameCoach, Inc. [CS] DESCRIPTION: Convertible Note. Pronunciation Guide Services; Location: Palo Alto, CA. | | 06/14/2022 | P | \$15,001 - \$50,000 | |

* 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 |
|----------------------------------|---------------|--------|
| National Association of Realtors | Spouse Salary | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|---------------------------|----------------|--------------------------|-------------------------|
| | USAA | June 2021 | Personal Loan | \$10,000 - \$15,000 |
| | American Express | June 2021 | Revolving Credit Account | \$15,001 - \$50,000 |
| | Citicard | June 2021 | Revolving Credit Account | \$15,001 - \$50,000 |
| JT | United Wholesale Mortgage | September 2021 | Home Mortgage | \$500,001 - \$1,000,000 |

| | | | | |
|----|--------|-------------|---------------|-------------------------|
| JT | Newrez | August 2022 | Home Mortgage | \$500,001 - \$1,000,000 |
|----|--------|-------------|---------------|-------------------------|

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|------------|---|--|
| March 2019 | Spouse and National Association of Realtors | Pension that will provide benefit upon retirement. |

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? |
| The Aspen Institute (Aspen Strategy Group) | 07/20/2022 | 07/21/2022 | Washington DC - Aspen - Washington DC | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- IRA Club
- National Association of Realtors 401K (Owner: SP)
- UBS Simple IRA (Owner: SP)

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. Ruben Gallego , 08/13/2024