

# UNITED STATES HOUSE OF REPRESENTATIVES 2022 FINANCIAL DISCLOSURE STATEMENT

Form A  
For Use by Members, Officers, and Employees

**HAND DELIVERED**<sup>13</sup>  
LEGISLATIVE RESOURCE CENTER

2023 Official Use Only: 51

Name: Hon. Doris O. Matsui

Daytime Telephone: 202-226-7163

U.S. HOUSE OF REPRESENTATIVES  
A \$200 penalty shall be assessed against any individual who files more than 30 days late.

FILER STATUS	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: CA District: 7	<input type="checkbox"/> Officer or Employee	Employing Office:	Staff Filer Type: (If Applicable) <input type="checkbox"/> Shared <input type="checkbox"/> Principal Assistant
	<input type="checkbox"/> 2022 Annual (Due: May 15, 2023)	<input checked="" type="checkbox"/> Amendment	<input type="checkbox"/> Termination	Date of Termination:	

## PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <u>or</u> b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	G. Did you, your spouse, or your dependent child receive any reportable gift(s) totaling more than \$415 in value from a single source during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	H. Did you, your spouse, or your dependent child receive any reportable travel or reimbursements for travel totaling more than \$415 in value from a single source during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	I. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"	

## IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER EACH OF THESE QUESTIONS

IPO - Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "Yes" to this question, please contact the Committee on Ethics for further guidance.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
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 that benefits you, your spouse, or dependent child?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
EXEMPTION - Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "Yes" unless you have first consulted with the Committee on Ethics.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

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Name: <u>Hon. Dante O. Matsui</u>	Page <u>3</u>
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Not classified as an E/F, but is subject to a Confidentiality Agreement

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						Type of Transaction	Amount of Transaction											
SP, DC, JT	Asset	Purchase	Sale	Partial Sale	Exchange	Check here if Capital Gains Exceeded \$200	Date  (MO/YR or Quarterly, Monthly, or Biweekly, if applicable)	A \$1,001 - \$15,000	B \$15,001 - \$50,000	C \$50,001 - \$100,000	D \$100,001 - \$250,000	E \$250,001 - \$500,000	F \$500,001 - \$1,000,000	G \$1,000,001 - \$5,000,000	H \$5,000,001 - \$25,000,000	I \$25,000,001 - \$50,000,000	J Over \$50,000,000	Over \$1,000,000 (Spouse/DC ≠ Asset)
SP	Perimeter Trust Capital, LLC																	
SP	Perimeter Trust Capital Fund, LP																	
SP	Adriatic Capital Partners, LP*																	
SP	Adriatic LPI Investment, LP*																	
SP	Sent Associates, LLC																	
SP	Northern Trust Money Market Fund																	
BP	Northern Trust Money Market Fund																	
BP	M Stager Adv. LLC																	
SP	BANVEST, LLC																	
SP	SGOF Landmark Master Ltd.			X			12/31/2022	X				X						
SP	AG Arctic Disposition Fund, LP			X			4/18/2022											
SP	AG Credit Recovery Partners VIII, LP																	
SP	AG Super Fund, LP																	
SP	IBSARS SP 500 ETF		X				11/15/2022											X
SP	Vanguard ESG US Stock ETF		X				11/15/2022											X
SP	Vanguard ESG Global Bond Fund		X				11/15/2022											X
SP	Aspen Charitable Remainder Trust																	
BP	Black Short-Term Bond Fund			X			3/29/2022						X					
BP	Black Short-Term Bond Fund			X			6/29/2022						X					
BP	Midwest Unrestricted Bond Fund			X			3/29/2022						X					
BP	Midwest Unrestricted Bond Fund						6/29/2022							X				
BP	Vanguard Total Stock Market ETF			X			6/27/2022											
BP	Vanguard ESG US Stock ETF			X			6/27/2022											
BP	Permian Core Equity Fund			X			6/27/2022					X						
BP	Permian Core Equity Fund			X			11/17/2022					X						
BP	Permian Core Equity Fund			X			12/29/2022		X									
BP	Vanguard Ultra Short-Term Bond Fund			X			2/4/2022											
BP	Vanguard Ultra Short-Term Bond Fund			X			3/31/2022			X								
BP	Vanguard Ultra Short-Term Bond Fund			X			6/29/2022											
BP	Vanguard Ultra Short-Term Bond Fund			X			6/15/2022											
BP	Vanguard Ultra Short-Term Bond Fund			X			6/29/2022											
BP	Vanguard Ultra Short-Term Bond Fund			X			6/27/2022											
BP	AG CEF Alpha Fund, LP			X			4/18/2022											
BP	AG Credit Solutions Fund I, PA		X				2/1/2022											
BP	Danaher Midstream Infrastructure (BNV), Ltd.																	
BP	Teneco Offshore Fund 1.1, Ltd.						4/1/2022											
BP	Anadarko Capital Partners Offshore, Ltd.						4/20/2022		X									
BP	Andromeda Capital Partners Offshore, Ltd.											X						
BP	Centerville Offshore Partners Offshore, Ltd.																	
BP	The Offshore Long Opportunities, Ltd.																	
BP	The Offshore Investment Fund																	
BP	The Offshore, Ltd.																	
BP	The Overlook Partners Fund, LP																	
BP	Generation IM Global Equity Fund, LLP																	
SP	Aspen Charitable Remainder Trust 2																	
BP	Black Short-Term Bond Fund			X			3/29/2022					X						
BP	Black Short-Term Bond Fund			X			3/29/2022					X						
BP	Midwest Unrestricted Bond Fund			X			6/27/2022					X						
BP	Vanguard Total Stock Market ETF			X			12/22/2022											
BP	Vanguard ESG US Stock ETF			X			12/22/2022											
BP	Vanguard Ultra Short-Term Bond Fund						6/29/2022					X						
BP	Vanguard Ultra Short-Term Bond Fund						6/27/2022											
BP	Ashtab Limited		X															
BP	Teneco Offshore Fund 1.1, Ltd.																	
BP	Ashtab Charitable Remainder Trust																	
BP	Black Short-Term Bond Fund			X			1/26/2022						X					
BP	Black Short-Term Bond Fund			X			2/9/2022											
BP	Black Short-Term Bond Fund			X			3/1/2022											
BP	Black Short-Term Bond Fund			X			6/22/2022											
BP	Black Short-Term Bond Fund			X			6/2/2022											
BP	Black Short-Term Bond Fund			X			6/2/2022											

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**INCOME LIMITS and PROHIBITED INCOME:** The 2022 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$29,895. The 2023 limit is \$31,815. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited.

**Use additional sheets if more space is required.**



# SCHEDULE D - LIABILITIES

Name: Hon. Doris O. Matsui

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. **Members:** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. \*Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability										
				A \$10,001-\$15,000	B \$15,001-\$50,000	C \$50,001-\$100,000	D \$100,001-\$250,000	E \$250,001-\$500,000	F \$500,001-\$1,000,000	G \$1,000,001-\$5,000,000	H \$5,000,001-\$25,000,000	I \$25,000,001-\$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Liability)
Example	First Bank of Wilmington, DE	5/20	Mortgage on Rental Property, Dover, DE				X							
JT	American Express	12/22	Credit Card			X								
SP	Chase	12/22	Credit Card		X									
SP	Northern Trust	12/22	Credit Card		X									

# SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude:** Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature.

Position	Name of Organization
Regent	Smithsonian Board of Regents
Advisory Board Member	Smithsonian National Museum of American History
Member of Advisory Council	Smithsonian National Museum of African American History and Culture

# **SCHEDULE F – AGREEMENTS**

Name: **Hon. Doris O. Matsui**

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Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement

# **SCHEDULE G – GIFTS**

Report the source (by name), a brief description, and the value of all gifts totaling more than \$415 received by you, your spouse, or your dependent child from any source during the year. Exclude: Gifts from relatives; gifts of personal hospitality from an individual (which may not include a registered lobbyist or foreign agent); local meals; and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of \$166 or less need not be added towards the \$415 disclosure threshold. Note: The gift rule (House Rule 25, clause 5) prohibits acceptance of gifts except as specifically provided in the rule and some gifts require prior approval of the Committee on Ethics.

Source		Description	Value
Example: Mr. Joseph Smith, Arlington, VA		Silver Platter (prior determination of personal friendship received from the Committee on Ethics)	\$600

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**EXCLUDE.** Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to the filer.

**Use additional sheets if more space is required.**

Name: **Hon. Doris O. Matsui**

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**Use additional sheets if more space is required.**

DORIS O. MATSUI  
7TH DISTRICT, CALIFORNIA

COMMITTEE ON ENERGY AND COMMERCE

SUBCOMMITTEE ON COMMUNICATIONS  
AND TECHNOLOGY

RANKING MEMBER

SUBCOMMITTEE ON ENERGY, CLIMATE,  
AND GRID SECURITY

SMITHSONIAN INSTITUTION,  
BOARD OF REGENTS

<http://matsui.house.gov>

**Congress of the United States**  
**House of Representatives**  
**Washington, DC 20515-0506**

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SACRAMENTO, CA 95814  
(916) 498-5800

9870 STUDIO COURT  
ELK GROVE, CA 95758

December 14, 2023

RE: Amended 2022 Financial Disclosure Statement

The Clerk's Office:

Enclosed is an amended 2022 Financial Disclosure Statement. At the time of the initial filing, my husband had not yet received several 2022 K-1s and year-end reports for his investments. Where information was not available, estimates were used. The enclosed Amended Financial Disclosure incorporates final 2022 income and values.

Please contact me with any questions.

Very truly yours,



Honorable Doris O. Matsui