



Filing ID #10041081

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Julia Brownley
Status: Member
State/District: CA26

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2019
Filing Date: 08/4/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA ⇒ AMER FUNDS WASHINGTON [IH]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
IRA ⇒ AMERICAN GROWTH FUND [IH]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
IRA ⇒ BLACKROCK INFLATION [IH]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
IRA ⇒ BR INF PTD BD FD INST CL [IH]		None	None		<input checked="" type="checkbox"/>
IRA ⇒ CAUSEWAY INTERNATIONAL [IH]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
IRA ⇒ CD BEAL BK SSB [IH]		None	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
IRA ⇒ EATON VANCE FLOATING [IH]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
IRA ⇒		None	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
EV FLOATING RATE CL I [IH]					
IRA ⇒ GLENMEDE SMALL CAP [IH]		None	None		<input checked="" type="checkbox"/>
IRA ⇒ GOLDMAN SACHS INTL SMALL [IH]		None	None		<input checked="" type="checkbox"/>
IRA ⇒ HARTFORD GROWTH [IH]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
IRA ⇒ JANUS HENDERSON SMALL [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
IRA ⇒ JP MORGAN EMERGING [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
IRA ⇒ MAINSTAY HIGH YIELD [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
IRA ⇒ MFS INTERNATIONAL GROWTH [IH]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
IRA ⇒ MFS TOTAL RETURN BOND [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
IRA ⇒ MFS VALUE FD CL I [IH]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
IRA ⇒ OPPENHEIMER INTERNATL GROWTH DF CL Y [IH]		None	None		<input checked="" type="checkbox"/>
IRA ⇒ PIMCO LOW DURATION FD [IH]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
IRA ⇒ PIMCO SHORT TERM FD [IH]		None	Capital Gains, Dividends	None	<input checked="" type="checkbox"/>
IRA ⇒ PIMCO TOTAL RETURN FUND [IH]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
IRA ⇒ SPDR PORTFOLIO AGGREGATE [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA ⇒ T ROWE PRICE QM US SMALL [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
IRA ⇒ TRP QM SM CP GRW [IH]		None	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
IRA ⇒ VANGUARD 500 INDEX FUND [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
IRA ⇒ VANGUARD FTSE DEVELOPED [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ AMER FUNDS WASHINGTON [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ AMERICAN CENTURY HIGH [MF]		None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ AMERICAN GROWTH FUND [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ BLACKROCK INFLATION [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ CAUSEWAY INTERNATIONAL [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ CD BEAL BK SSB [MF]		None	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ EATON VANCE FLOATING [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ GLENMEDE SMALL CAP [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ GOLDMAN SACHS EFT TRUST [MF]		None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ HARTFORD GROWTH [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ ISHARES TR CORE MSCI EAF [MF]		None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Merrill Lynch ⇒ JP MORGAN EMERGING [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ MAINSTAY MACKAY HIGH [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ MFS INTERNATIONAL GROWTH [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ MFS TOTAL RETURN BOND [MF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Merrill Lynch ⇒ MFS VALUE FD CL I [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ PIMCO LOW DURATION FD [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ PIMCO SHORT TERM FD [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ SPDR PORTFOLIO AGGREGATE [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ SPDR PORTFOLIO S&P 500 G [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ T ROWE PRICE QM US SMALL [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ VANGUARD 500 INDEX FUND [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ VANGUARD FTSE DEVELOPED [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ VANGUARD SMALL CAP [MF]		None	None		<input type="checkbox"/>
DESCRIPTION: Full disposition					
Other Securities ⇒ AIG Annuity - Fixed ⇒ American General Life Insurance [OT]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Interest					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Real Estate ⇒ 10 acres in Kern County [RP]		None	None		<input type="checkbox"/>
LOCATION: Kern County, CA, US					
Real Estate ⇒ Santa Monica, California [RP]		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Santa Monica, California, CA, US					

* 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?
IRA ⇒ AMER FUNDS WASHINGTON [IH]		Quarterly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA ⇒ AMER FUNDS WASHINGTON [IH]		Quarterly	P	\$1,001 - \$15,000	
IRA ⇒ AMERICAN GROWTH FUND [IH]		Quarterly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA ⇒ AMERICAN GROWTH FUND [IH]		Quarterly	P	\$1,001 - \$15,000	
IRA ⇒ BR INF PTD BD FD INST CL [IH]		Quarterly	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ BR INF PTD BD FD INST CL [IH]		Quarterly	P	\$1,001 - \$15,000	
IRA ⇒ CAUSEWAY INTERNATIONAL [IH]		Quarterly	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ CAUSEWAY INTERNATIONAL [IH]		Quarterly	P	\$1,001 - \$15,000	
IRA ⇒ CD BEAL BK SSB [IH]		Quarterly	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA ⇒ CD BEAL BK SSB [IH]		Quarterly	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA ⇒ EV FLOATING RATE CL I [IH]		Quarterly	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ EV FLOATING RATE CL I [IH]		Quarterly	P	\$1,001 - \$15,000	
IRA ⇒ GLENMEDE SMALL CAP [IH]		Quarterly	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ GLENMEDE SMALL CAP [IH]		Quarterly	P	\$1,001 - \$15,000	
IRA ⇒ GOLDMAN SACHS INTL SMALL [IH]		Quarterly	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ HARTFORD GROWTH [IH]		Quarterly	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ HARTFORD GROWTH [IH]		Quarterly	P	\$1,001 - \$15,000	
IRA ⇒ JANUS HENDERSON SMALL [IH]		Quarterly	P	\$1,001 - \$15,000	
IRA ⇒ JP MORGAN EMERGING [IH]		Quarterly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA ⇒ JP MORGAN EMERGING [IH]		Quarterly	P	\$15,001 - \$50,000	
IRA ⇒ MAINSTAY HIGH YIELD [IH]		Quarterly	P	\$1,001 - \$15,000	
IRA ⇒ MFS INTERNATIONAL GROWTH [IH]		Quarterly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA ⇒ MFS INTERNATIONAL GROWTH [IH]		Quarterly	P	\$15,001 - \$50,000	
IRA ⇒ MFS TOTAL RETURN BOND [IH]		Monthly	P	\$1,001 - \$15,000	
IRA ⇒		Monthly	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
MFS VALUE FD CL I [IH]			(partial)		
IRA ⇒ MFS VALUE FD CL I [IH]		Monthly	P	\$15,001 - \$50,000	
IRA ⇒ OPPENHEIMER INTERNATL GROWTH DF CL Y [IH]		Monthly	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA ⇒ PIMCO LOW DURATION FD [IH]		Monthly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA ⇒ PIMCO LOW DURATION FD [IH]		Monthly	P	\$1,001 - \$15,000	
IRA ⇒ PIMCO SHORT TERM FD [IH]		Monthly	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA ⇒ PIMCO SHORT TERM FD [IH]		Monthly	P	\$15,001 - \$50,000	
IRA ⇒ PIMCO TOTAL RETURN FUND [IH]		Monthly	P	\$15,001 - \$50,000	
IRA ⇒ SPDR PORTFOLIO AGGREGATE [IH]		Monthly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA ⇒ SPDR PORTFOLIO AGGREGATE [IH]		Monthly	P	\$1,001 - \$15,000	
IRA ⇒ T ROWE PRICE QM US SMALL [IH]		Monthly	P	\$1,001 - \$15,000	
IRA ⇒ VANGUARD 500 INDEX FUND [IH]		Monthly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA ⇒ VANGUARD FTSE DEVELOPED [IH]		Monthly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ AMER FUNDS WASHINGTON [MF]		Quarterly	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ AMER FUNDS WASHINGTON [MF]		Quarterly	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch ⇒ AMERICAN CENTURY HIGH [MF]		Monthly	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ AMERICAN GROWTH FUND [MF]		Quarterly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ AMERICAN GROWTH FUND [MF]		Quarterly	P	\$1,001 - \$15,000	
Merrill Lynch ⇒ BLACKROCK INFLATION [MF]		Quarterly	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ BLACKROCK INFLATION [MF]		Quarterly	P	\$1,001 - \$15,000	
Merrill Lynch ⇒ CAUSEWAY INTERNATIONAL [MF]		Quarterly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ CAUSEWAY INTERNATIONAL [MF]		Quarterly	P	\$50,001 - \$100,000	
Merrill Lynch ⇒ CD BEAL BK SSB [MF]		Quarterly	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Merrill Lynch ⇒ EATON VANCE FLOATING [MF]		Monthly	P	\$50,001 - \$100,000	
Merrill Lynch ⇒ GLENMEDE SMALL CAP [MF]		Monthly	P	\$15,001 - \$50,000	
Merrill Lynch ⇒ GOLDMAN SACHS EFT TRUST [MF]		Quarterly	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ GOLDMAN SACHS EFT TRUST [MF]		Quarterly	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ HARTFORD GROWTH [MF]		Quarterly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ HARTFORD GROWTH [MF]		Quarterly	P	\$50,001 - \$100,000	
Merrill Lynch ⇒ ISHARES TR CORE MSCI EAF [MF]		Quarterly	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch ⇒ JP MORGAN EMERGING [MF]		Quarterly	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ JP MORGAN EMERGING [MF]		Quarterly	P	\$50,001 - \$100,000	
Merrill Lynch ⇒ MAINSTAY MACKAY HIGH [MF]		Quarterly	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Merrill Lynch ⇒ MAINSTAY MACKAY HIGH [MF]		Quarterly	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Merrill Lynch ⇒ MAINSTAY MACKAY HIGH [MF]		Quarterly	P	\$1,001 - \$15,000	
Merrill Lynch ⇒ MFS INTERNATIONAL GROWTH [MF]		Quarterly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ MFS INTERNATIONAL GROWTH [MF]		Quarterly	P	\$50,001 - \$100,000	
Merrill Lynch ⇒ MFS TOTAL RETURN BOND [MF]		Quarterly	P	\$15,001 - \$50,000	
Merrill Lynch ⇒ MFS VALUE FD CL I [MF]		Monthly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ MFS VALUE FD CL I [MF]		Monthly	P	\$50,001 - \$100,000	
Merrill Lynch ⇒ PIMCO LOW DURATION FD [MF]		Monthly	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Merrill Lynch ⇒ PIMCO LOW DURATION FD [MF]		Monthly	P	\$1,001 - \$15,000	
Merrill Lynch ⇒ PIMCO SHORT TERM FD [MF]		Monthly	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Merrill Lynch ⇒ PIMCO SHORT TERM FD [MF]		Monthly	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch ⇒ SPDR PORTFOLIO AGGREGATE [MF]		Monthly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ SPDR PORTFOLIO AGGREGATE [MF]		Monthly	P	\$1,001 - \$15,000	
Merrill Lynch ⇒ SPDR PORTFOLIO S&P 500 G [MF]		Monthly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ T ROWE PRICE QM US SMALL [MF]		Monthly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ T ROWE PRICE QM US SMALL [MF]		Monthly	P	\$15,001 - \$50,000	
Merrill Lynch ⇒ VANGUARD 500 INDEX FUND [MF]		Monthly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ VANGUARD FTSE DEVELOPED [MF]		Monthly	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Merrill Lynch ⇒ VANGUARD FTSE DEVELOPED [MF]		Monthly	P	\$15,001 - \$50,000	
Merrill Lynch ⇒ Vanguard Small Cap [MF]		Monthly	S	\$0.00	<input type="checkbox"/>
DESCRIPTION: Full Disposition					

* 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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Capital Hill Tower Housing Cooperative Inc.	July 2015	Mortgage	\$50,001 - \$100,000
	Truist Bank (FKA BB&T Mortgage)	July 2015	Mortgage	\$50,001 - \$100,000
	Merrill Lynch	April 2013	Mortgage - Westlake Village, CA	\$500,001 -

Owner	Creditor	Date Incurred	Type	Amount of Liability
				\$1,000,000
	Merrill Lynch	Feb 2013	Mortgage - Santa Monica, CA	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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?
National Committee on US-China Relations	03/15/2019	03/24/2019	Washington DC - Hong Kong - Hangzhou - Beijing - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Aspen Institute	10/12/2019	10/15/2019	Los Angeles, CA - Aspen, CO - 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 ASSET CLASS DETAILS

<ul style="list-style-type: none"> IRA DESCRIPTION: ML 230-80737 Merrill Lynch (100% Interest) LOCATION: US DESCRIPTION: ML 230-18317 Other Securities LOCATION: US Other Securities ⇒ AIG Annuity - Fixed Real Estate LOCATION: US
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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. Julia Brownley , 08/4/2021