



Filing ID #10037681

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Debbie Lesko  
**Status:** Member  
**State/District:** AZ08

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2019  
**Filing Date:** 08/12/2020

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
AZ STATE PENSION [PE]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Capital One Bank [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>
Chase Bank Accounts [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200 <input type="checkbox"/>
FI-401k ⇒ Target Retirement 2025 [MF]	SP	\$250,001 - \$500,000	Tax-Deferred	<input type="checkbox"/>
FI-401k ⇒ Target Retirement 2030 [MF]	SP	\$100,001 - \$250,000	Tax-Deferred	<input type="checkbox"/>
Investment ⇒ AMER BEACON AHL MNGD FUT STR Y (AHLYX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ BLACKROCK NATIONAL MUNI I (MANLX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ BLACKSTONE ALT MULTI-START INST (BXMIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200 <input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Tx. &gt; \$1,000?</b>
Investment ⇒ CAUSEWAY EMERGING MKTS INST (CEMIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ EDGEWOOD GROWTH INSTL (EGFIX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ HARDING LOEVNER INTL EQTY INST (HLMIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ JOHN HANCOCK SEAPORT I (JSFDX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ JP MORGAN VALUE ADVANTAGE (JVASX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ LAZARD INTL STRAT EQ PTF INST (LISIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ LOOMIS GROWTH Y (LSGRX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ MORGAN STANLEY BANK [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ NEUBERGER INTRINSIC VALUE INST (NINLX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200 <input type="checkbox"/>
COMMENTS: Asset does not appear on previous report due to valuation under \$1,000.				
Investment ⇒ PEAR TREE POLARIS FOREIGN VALUE INSTL (QFVIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ PIMPCO Short-Term (PTSPX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ TORTOISE MLP & PIPELINE INST (TORIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200 <input type="checkbox"/>
Investment ⇒ WELLS FARGO ST MUNI BD INS (WSBIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200 <input type="checkbox"/>
MSIRA ⇒ MS PATHWAY CORE FIXED INCOME (TIIUX) [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
COMMENTS: Asset does not appear on previous report due to valuation under \$1,000.				

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Tx. &gt; \$1,000?</b>
MSIRA ⇒ MS PATHWAY INTL EQ (TIEUX) [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Comments: Asset name changed. Previously listed as "Consulting group International Eq Invst"				
One AZ Credit Union [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200 <input type="checkbox"/>
RIRA ⇒ FIRST EAGLE OVERSEAS I (SGOIX) [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
RIRA ⇒ GOLDMAN SACHS ABSLT RET TRCK (GJRTX) [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Comments: Asset does not appear on previous report due to valuation under \$1,000.				
RIRA ⇒ iShares S&P 500 GROWTH ETF (IVW) [EF]		\$1 - \$1,000	Tax-Deferred	<input type="checkbox"/>
RIRA ⇒ iShares S&P 500 VAL ETF (IVE) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
RIRA ⇒ WESTERN ASSET CORE PLUS BOND (WACPX) [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
RIRA-2 ⇒ Vanguard Growth Index Admiral (VIGAX) [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
US Savings Bonds [GS]		\$50,001 - \$100,000	None	<input type="checkbox"/>
WF ⇒ The 2025 Retirement Fund [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred	<input checked="" type="checkbox"/>
WF ⇒ The Diversified Bond Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
WF ⇒ The Stable Value Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
WF-RP ⇒ American Express Retirement Plan [IH]	SP	\$1,001 - \$15,000	Tax-Deferred	<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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
WF ⇒ The 2025 Retirement Fund [MF]	SP	01/15/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	01/30/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	01/31/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	02/15/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	02/28/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	03/15/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	03/26/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	03/29/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	04/15/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	04/29/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	04/30/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	05/15/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	05/31/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	06/14/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
WF ⇒ The 2025 Retirement Fund [MF]	SP	06/28/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	07/15/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	07/25/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	07/31/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	08/15/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	08/30/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	09/13/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	09/30/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	10/15/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	10/30/2019	P	\$1,001 - \$15,000	
WF ⇒ The 2025 Retirement Fund [MF]	SP	10/31/2019	P	\$1,001 - \$15,000	

\* 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
American Express	Spouse Salary	N/A

#### SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2009	Me and State of AZ	Participate in AZ State Pension Plan

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Education Foundation	08/8/2019	08/16/2019	Phoenix, AZ - Tel Aviv, Israel - Phoenix, AZ	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- FI-401k (Owner: SP)
- Investment  
LOCATION: US
- MSIRA
- RIRA
- RIRA-2
- WF (Owner: SP)
- WF-RP (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:** Debbie Lesko , 08/12/2020