



Filing ID #10036805

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Chrissy Houlahan
Status: Member
State/District: PA06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/2/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank Accounts ⇒ Wells Fargo [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Credit Account [BA]	JT	None	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Discovery Growth Fund [MF]	JT	\$50,001 - \$100,000	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Discovery Value Fund [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Emerging Markets Portfolio [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB International Small Cap Portfolio [MF]	JT	None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB International Strategic Equities [MF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AB Small Cap Core Portfolio [MF]					
Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF]	JT	\$250,001 - \$500,000	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Bernstein Tax Mgt Intl Portfolio [MF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Bernsteing Diversified Municipal Portfolio [MF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A Portfolio [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B Portfolio [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Barton W Houlahan IRA Rollover ⇒ Alliance Bernstein All Market Class 1 [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Credit Balance [BA]	SP	None	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Growth Fund [MF]	SP	\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Value Fund [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Emerging Markets Portfolio [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Small Cap Core Portfolio [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustainable Global Theme [MF]	SP	\$250,001 - \$500,000	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ Bernstein Tax Managing Intl Portfolio [MF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Christina J Houlahan IRA 13743 ⇒ Alliance Bernstein All Market Class 1 [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Christina J Houlahan Trust 50974 ⇒ Bernstein Short Dur Diversified Municipal Portfolio [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<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?
Bart and Christina Houlahan 03694 ⇒ AB Discovery Growth Fund [MF]	JT	12/12/2019	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Discovery Growth Fund [MF]	JT	05/10/2019	P	\$15,001 - \$50,000	
Bart and Christina Houlahan 03694 ⇒ AB Discovery Value Fund [MF]	JT	12/16/2019	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Discovery Value Fund [MF]	JT	05/10/2019	P	\$15,001 - \$50,000	
Bart and Christina Houlahan 03694 ⇒ AB Emerging Markets Portfolio [MF]	JT	05/10/2019	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB International Small Cap Portfolio [MF]	JT	05/10/2019	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB International Strategic Equities Portfolio [MF]	JT	07/23/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB International Strategic Equities Portfolio [MF]	JT	12/13/2019	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB International Strategic Equities Portfolio [MF]	JT	05/10/2019	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Bart and Christina Houlahan 03694 ⇒ AB Small Cap Portfolio [MF]	JT	05/10/2019	P	\$15,001 - \$50,000	
Bart and Christina Houlahan 03694 ⇒ AB Sustainable Global Theme [MF]	JT	12/12/2019	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Sustainable Global Theme [MF]	JT	05/10/2019	P	\$100,001 - \$250,000	
Bart and Christina Houlahan 03694 ⇒ AB Tax Aware Overlay A Portfolio [MF]	JT	05/10/2019	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Tax Aware Overlay B Portfolio [MF]	JT	05/10/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [MF]	JT	07/23/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [MF]	JT	05/10/2019	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Bernstein Tax Mng International Portfolio [MF]	JT	12/11/2019	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ Bernstein Tax Mng International Portfolio [MF]	JT	05/10/2019	P	\$50,001 - \$100,000	
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A Portfolio [MF]	JT	12/18/2019	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B Portfolio [MF]	JT	12/18/2019	P	\$1,001 - \$15,000	
Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF]	SP	12/18/2019	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Growth Fund [MF]	SP	12/12/2019	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Growth Fund [MF]	SP	05/9/2019	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Value Fund [MF]	SP	12/16/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Value Fund [MF]	SP	05/9/2019	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Emerging Markets Portfolio [MF]	SP	05/9/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Small Cap Core Portfolio [MF]	SP	05/9/2019	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustainable Global Theme [MF]	SP	12/12/2019	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustainable Global Theme [MF]	SP	05/10/2019	P	\$250,001 - \$500,000	
Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF]		12/18/2019	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
B Lab	Spouse Salary	\$211,708.26

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo	January 2001	Primary Residence Mortgage	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Bank Accounts (Owner: JT)
LOCATION: US
- Bart and Christina Houlahan 03694 (Owner: JT)
LOCATION: US
- Barton W Houlahan IRA Rollover (Owner: SP)
DESCRIPTION: IRA
- Barton W. Houlahan Irrevocable Trust 33482 (Owner: SP)
- Christina J Houlahan IRA 13743
- Christina J Houlahan Trust 50974

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. Chrissy Houlahan , 08/2/2020