



Filing ID #10056509

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Maxine Dexter
Status: Congressional Candidate
State/District: OR03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 04/1/2024
Period Covered: 01/01/2023– 03/4/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab ⇒ Ford Motor Company Common Stock (F) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab ⇒ Lowe's Companies, Inc. Common Stock (LOW) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab ⇒ Quanta Services, Inc. Common Stock (PWR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
KaiPerm CD [BA]	JT	\$15,001 - \$50,000	None		
KaiPerm Checking [BA]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
KaiPerm MM [BA]	JT	\$100,001 -	Dividends	\$201 - \$1,000	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
		\$250,000			\$1,000
KaiPerm Savings [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Life Insurance (Maxine) [WU]		\$1,000,001 - \$5,000,000	None		
Life Insurance (Rob) [WU]		\$1,000,001 - \$5,000,000	None		
Maxine's NWP 401K ⇒ Fidelity Balanced Fund Class K (FBAKX) [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
Maxine's NWP 401K ⇒ Fidelity Diversified International K6 Fund (FKIDX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Maxine's NWP 401K ⇒ Fidelity Diversified International K6 Fund (FKIDX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Maxine's NWP 401K ⇒ Vanguard Index Trust Mid-Cap Index Fund Institutional Shares (VMCIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Maxine's NWP 401K ⇒ Vanguard Index Trust Small-Cap Index Fund Instl Shares (VSCIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Maxine's NWP 401K ⇒ Vanguard Intermediate-Term Bond Index Fund Institutional Shares (VBIMX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Maxine's NWP 401K ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares (VSMPX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
MFS (OR) Alex ⇒ 1008 - COLLEGE ENROLLMENT 2024 FUND CL A [5F]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
LOCATION: OR					
MFS (OR) Alex ⇒ COLLEGE ENROLLMENT 2022 FUND CL A [5F]		\$50,001 - \$100,000	None		
LOCATION: OR					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
MFS (OR) Sophia ⇒ 1006 College Enrollment 2022 [5F] LOCATION: OR		\$15,001 - \$50,000	sold to pay tuition	\$15,001 - \$50,000	\$15,001 - \$50,000
Northwest Permanente Pension [DB]		Undetermined	None		
Northwest Permanente Pension [DB]	SP	Undetermined	None		
OnPoint CU [BA]	JT	\$1,001 - \$15,000	None		
Oregon Savings Growth Plan ⇒ BlackRock LifePath Index 2035 Fund - Investor P Shares (LIJPX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Primary Home [RP] LOCATION: Portland / Multnomah, OR, US DESCRIPTION: ADU rental is in the home - rented all 12 months	JT	\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Rob's NWP 401K ⇒ Fidelity Balanced Fund Class K (FBAKX) [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
Rob's NWP 401K ⇒ Fidelity Diversified International K6 Fund (FKIDX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Rob's NWP 401K ⇒ Vanguard Index Trust Mid-Cap Index Fund Institutional Shares (VMCIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Rob's NWP 401K ⇒ Vanguard Index Trust Small-Cap Index Fund Instl Shares (VSCIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Rob's NWP 401K ⇒ Vanguard Intermediate-Term Bond Index Fund Institutional Shares (VBIMX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Rob's NWP 401K ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares (VSMPX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		
Rob's Wells Fargo IRA ⇒ Rob WF IRA [IH]	SP	\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Scholars Choice (CO) Alex ⇒ Alex Scholars Choice [5F] LOCATION: CO		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scholars Choice (CO) Sophia ⇒ Sophia Scholar's Choice [5F] LOCATION: CO		None	sold to pay tuition	None	\$15,001 - \$50,000
Wells Fargo [BA]	JT	\$1,001 - \$15,000	None		
Wells Fargo Brokerage ⇒ American Funds EuroPacific Growth A (AEPGX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo Brokerage ⇒ American Funds Investment Co of America A (AIVSX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo Brokerage ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Wells Fargo IRA ⇒ WFCS CUSTODIAN TRAD IRA [IH]		\$50,001 - \$100,000	Tax-Deferred		

* 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 Current Year to Filing	Amount Preceding Year
Northwest Permanente	Salary	\$46,000.00	\$185,654.00
Northwest Permanente	Spouse Salary	N/A	N/A
State of Oregon	Salary	\$9,142.00	\$30,815.00
University of Virginia	Daughter Wages	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	OnPoint CU	May 2014	Primary home	\$500,001 - \$1,000,000
JT	OnPoint CU	November 2023	Rav4	\$15,001 - \$50,000
JT	Mr. Cooper	Mar 2012	Govy cabin	\$100,001 - \$250,000
	Mohela	July 2001	Medical School Loans	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">◦ Charles Schwab◦ Maxine's NWP 401K◦ MFS (OR) Alex LOCATION: OR◦ MFS (OR) Sophia LOCATION: OR◦ Oregon Savings Growth Plan◦ Rob's NWP 401K (Owner: SP)◦ Rob's Wells Fargo IRA (Owner: SP)◦ Scholars Choice (CO) Alex LOCATION: CO◦ Scholars Choice (CO) Sophia LOCATION: CO◦ Wells Fargo Brokerage (Owner: JT) DESCRIPTION: Straight brokerage account (mutual fund)◦ Wells Fargo IRA
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EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Maxine Dexter , 04/1/2024