



Filing ID #10038354

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ed Case  
**Status:** Member  
**State/District:** HI01

## 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?
Alliant Credit Union [BA]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Altria Group, Inc. (MO) [ST]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
Amazon.com, Inc. (AMZN) [ST]		\$100,001 - \$250,000	None		<input type="checkbox"/>
American Funds New Perspective RS [MF]		\$15,001 - \$50,000	Dividends	Not Applicable	<input type="checkbox"/>
Apple Inc. (AAPL) [ST]		\$250,001 - \$500,000	Dividends	Not Applicable	<input type="checkbox"/>
Employees' Retirement System of the State of Hawai'i [DB]		Undetermined	Pension	\$5,001 - \$15,000	<input type="checkbox"/>
Fidelity Government Cash Reserves [MF]		\$100,001 - \$250,000	Dividends	Not Applicable	<input type="checkbox"/>
FPA Crescent [MF]		\$15,001 - \$50,000	Dividends	Not Applicable	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
General Electric Company (GE) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
Harbor Capital Appreciation Fund 1 [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
Hawaii State Federal Credit Union [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Johnson & Johnson (JNJ) [ST]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
JP Morgan Mid Cap Value L [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
Kinder Morgan, Inc. (KMI) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
NT S&P 500 Index NL T3 [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
PGIM Global Real Estate Z [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
T. Rowe Price Retirement 2015 [MF]		\$15,001 - \$50,000	Dividends	Not Applicable	<input type="checkbox"/>
T. Rowe Price Retirement 2025 [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
T. Rowe Price Retirement 2035 [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
T. Rowe Price Retirement 2040 [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
UAL Stock Fund [MF]		\$1 - \$1,000	Dividends	Not Applicable	<input type="checkbox"/>
US Equity Index [MF]		\$100,001 - \$250,000	Dividends	Not Applicable	<input type="checkbox"/>
Vanguard 500 Index Admiral [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Extended Duration Treasury Index [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Federal Money Market Fund [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard FTSE Developed Mkts [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Health Care Admiral CL [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard High Dividend Yield [EF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Intl Divid Apprec [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Long Term Treasury [EF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Target 2015 [MF]		\$100,001 - \$250,000	Dividends	Not Applicable	<input type="checkbox"/>
Vanguard Target 2020 [MF]		\$100,001 - \$250,000	Dividends	Not Applicable	<input type="checkbox"/>
Vanguard Total Bond Market [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Westinghouse Air Brake Technologies Corporation (WAB) [ST]		\$1 - \$1,000	Dividends	Not Applicable	<input type="checkbox"/>

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE B: TRANSACTIONS

None disclosed.

## SCHEDULE C: EARNED INCOME

None disclosed.

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Senior Vice President/Chief Legal Officer COMMENTS: Resigned 2018	Outrigger Hotels Hawaii
Vice Chair COMMENTS: Resigned 2018	Waikiki Improvement Association
Vice President COMMENTS: Resigned 2018	Waikiki Beach Special Improvement District Association

## 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.

## 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. Ed Case , 08/12/2020