



Filing ID #10055519

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Summer Lee
Status: Member
State/District: PA12

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2022
Filing Date: 08/13/2023
Period Covered: 01/01/2021– 12/31/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Pennsylvania State Employees Retirement System Pension Plan [PE]		\$15,001 - \$50,000	None		
PNC Bank Virtual Wallet Growth Account [BA]		\$15,001 - \$50,000	Interest	Not Applicable	\$1 - \$200

* 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
Pennsylvania House of Representatives	Salary	N/A	\$88,533.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	American Education Services	August 2005 - May 2009	Student Loan debt	\$15,001 - \$50,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Aidvantage/Navient	August 2005 - May 2009; August 2012 - May 2015	Consolidated student loan debt for Penn State and Howard University School of Law	\$250,001 - \$500,000
	Citizen Bank	January 7, 2021	Mortgage on Personal Residence	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Chair	UNITE PAC
Board member	New Pennsylvania Project
Representative	Pennsylvania House of Representatives

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2022	Pennsylvania State Employees Retirement System; Summer Lee	Continued participation in pension plan.

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

None disclosed.

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: Hon. Summer Lee , 08/13/2023