



Filing ID #10052919

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Colin Allred
Status: Member
State/District: TX32

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 05/15/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bert Bell/Pete Rozelle NFL Player Retirement Plan [DB]		Undetermined	None		<input type="checkbox"/>
DESCRIPTION: The amount of the pension will vary depending upon what age the Filer begins to draw his pension. He is not eligible to draw until April 2038.					
Cleary Gottlieb Fidelity Retirement Plan ⇒ Vanguard Target 2055 [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: A target date fund with an investment mix of stocks and bonds.					
Cooley LLP Salary Deferral & Profit Sharing Plan ⇒ Schwab Indexed Retirement Trust Fund 2055 [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: A target date fund with an investment mix across a variety of asset classes.					
Fidelity Advisor Intermediate Municipal Income Fund (FIQZX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Salem Street Trust Fidelity 500 Index Fund (FXAIX) [MF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Salem Street Trust Int'l Index Fund (FSPSX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
iShares Trust 7-10 Year Treasury Bond ETF (IEF) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: New					
JP Morgan BetaBuilders Canada ETF (BBCA) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JP Morgan BetaBuilders Developed Asia ex Japan ETF (BBAX) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JP Morgan BetaBuilders Europe ETF (BBEU) [EF]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: SOLD					
JP Morgan BetaBuilders Japan ETF (BBJP) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JP Morgan Chase Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
JP Morgan Chase Savings Account [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
JP Morgan Tr. II US Gov't Money Market Fund [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Legal Aid of NorthWest Texas 401K Thrift Plan ⇒ Mutual of America 2055 Retirement Fund [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Legal Aid of NorthWest Texas 401K Thrift Plan ⇒ Mutual of America Money Market Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
NFL Health Reimbursement Account (HRA) [OT]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: The NFL Health Reimbursement Account (HRA) reimburses a wide variety of IRS eligible medical expenses. This account does not earn any interest.					
NFL Player Annuity Program Trust [OT]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Through the NFL Player Annuity Program, a player's club deposited money into an investment account on the player's behalf during their years of play. When eligible, the player may choose how and when to access the funds.					
NFL Player Second Career Savings Plan 401(k) Savings Plan ⇒ NFL 401(k) Savings Plan Int'l Equity Fund [OT]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: This is a customized fund created by the Savings Board of the NFL Player Second Career Savings Plan (401(k) Savings Plan) and available only as part of the 401(k) Savings Plan and the NFL Player Capital Accumulation Plan; it is not a mutual fund offered to the general public. The composition of the fund is determined by the Fund's investment advisor.					
NFL Player Second Career Savings Plan 401(k) Savings Plan ⇒		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
NFL 401(k) Savings Plan Target Date 2045 Fund [OT]					
DESCRIPTION: This is a customized fund created by the Savings Board of the NFL Player Second Career Savings Plan (401(k) Savings Plan) and available only as part of the 401(k) Savings Plan and the NFL Player Capital Accumulation Plan; it is not a mutual fund offered to the general public. The composition of the fund is determined by the Fund's investment advisor.					
NFL Player Second Career Savings Plan 401(k) Savings Plan ⇒		\$100,001 -		Tax-Deferred	<input type="checkbox"/>
NFL 401(k) Savings Plan US Large Company Equity Fund [OT]		\$250,000			
DESCRIPTION: This is a customized fund created by the Savings Board of the NFL Player Second Career Savings Plan (401(k)) Savings Plan and available only as part of the 401(k) Savings Plan and NFL Player Capital Accumulation Plan; it is not a mutual fund offered to the general public. The composition of the fund is determined by the Fund's investment advisor.					
NFL Player Second Career Savings Plan 401(k) Savings Plan ⇒		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
NFL 401(k) Savings Plan US Mid/Small Company Equity Fund [OT]					
DESCRIPTION: This is a customized fund created by the Savings Board of the NFL Player Second Career Savings Plan (401(k) Savings Plan) and available only as part of the 401(k) Savings Plan and the NFL Player Capital Accumulation Plan; it is not a mutual fund offered to the general public. The composition of the fund is determined by the Fund's investment advisor.					
NY's Advisor-Guided College Savings Program: JP Morgan 529 Age-Based 0-5 Portfolio A [OT]	DC	\$50,001 - \$100,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Established for child born in 2021 (Dependent Child #2). Filer has no control over investment decisions.					
NY's Advisor-Guided College Savings Program: JP Morgan 529 Age-Based 0-5 Portfolio A [OT]	DC	\$50,001 - \$100,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Established in 2019 (Dependent Child #1). Filer has no control over investment decisions.					
Perkins Coie Salary Deferral Plan ⇒		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Vanguard Target Retirement 2050 Trust II [MF]					
DESCRIPTION: A fund of funds structure that seeks to build appropriate asset allocation from preselected stock and bond portfolios. The trust handles investment selection, asset allocation, and rebalancing through retirement.					
Schwab Strat. Tr. Intermediate-Term US Treasury (SCHR) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Repurchased in 2022 after being sold in 2021.					
Schwab Strategic Trust Short-Term US Treasury (SCHO) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Six Circles Int'l Unconstrained Equity Fund (CUSUX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Six Circles Tr. Tax Aware Bond Fund (CBTAX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Six Circles Trust Credit Opportunities Fund (CRDOX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
\$1,000					<input checked="" type="checkbox"/>
Six Circles US Unconstrained Equity Fund (CIUEX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
US Treasury Securities (US Savings Bonds) [GS]	SP	\$15,001 - \$50,000	Interest	None	<input type="checkbox"/>
Vanguard Municipal Tax Exempt Bond ETF (VTEB) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: New					
Vanguard Scottsdale Funds Intermediate Term Treas. ETF (VGIT) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: New					

* 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?
Cooley LLP Salary Deferral & Profit Sharing Plan: Schwab Indexed Retirement Trust Fund 2055 [MF]	SP	01/13/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Contribution to Retirement Plan					
Cooley LLP Salary Deferral & Profit Sharing Plan: Schwab Indexed Retirement Trust Fund 2055 [MF]	SP	01/28/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Contribution to Retirement Plan					
Cooley LLP Salary Deferral & Profit Sharing Plan: Schwab Indexed Retirement Trust Fund 2055 [MF]	SP	02/14/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Contribution to Retirement Plan					
Cooley LLP Salary Deferral & Profit Sharing Plan: Schwab Indexed Retirement Trust Fund 2055 [MF]	SP	02/25/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Contribution to Retirement Plan					
Cooley LLP Salary Deferral & Profit Sharing Plan: Schwab Indexed Retirement Trust Fund 2055 [MF]	SP	03/14/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Contribution to Retirement Plan					
Cooley LLP Salary Deferral & Profit Sharing Plan: Schwab Indexed Retirement Trust Fund 2055 [MF]	SP	03/30/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Contribution to Retirement Plan					
Cooley LLP Salary Deferral & Profit Sharing Plan: Schwab Indexed Retirement Trust Fund 2055 [MF]	SP	04/14/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Contribution to Retirement Plan					
Fidelity Salem Street Trust Fidelity 500 Index Fund (FXAIX) [MF]	JT	02/1/2022	P	\$1,001 - \$15,000	
Fidelity Salem Street Trust Fidelity 500 Index Fund (FXAIX) [MF]	JT	08/5/2022	P	\$1,001 - \$15,000	
Fidelity Salem Street Trust Fidelity 500 Index Fund (FXAIX) [MF]	JT	06/6/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Salem Street Trust Fidelity 500 Index Fund (FXAIX) [MF]	JT	10/6/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Salem Street Trust Fidelity 500 Index Fund (FXAIX) [MF]		07/5/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvestment					
Fidelity Salem Street Trust Fidelity 500 Index Fund (FXAIX) [MF]	JT	10/11/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvestment					
Fidelity Salem Street Trust Fidelity 500 Index Fund (FXAIX) [MF]	JT	12/19/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvestment					
Fidelity Salem Street Trust Intl Index Fund (FSPSX) [MF]	JT	08/5/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Salem Street Trust Intl Index Fund (FSPSX) [MF]	JT	10/6/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares Trust 7-10 Year Treasury Bond ETF (EIF) [EF]	JT	02/15/2022	P	\$1,001 - \$15,000	
JP Morgan BetaBuilders Europe ETF (BBEU) [EF]	JT	06/6/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JP Morgan BetaBuilders Europe ETF (BBEU) [EF]	JT	06/6/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JP Morgan BetaBuilders Europe ETF (BBEU) [EF]	JT	08/5/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
NY's Advisor-Guided College Savings Program: JP Morgan 529 Age-Based 0-5 Portfolio A [OT] LOCATION: US DESCRIPTION: Contribution to college savings plan for DC1. Filer has no control over investment decisions.	DC	01/28/2022	P	\$1,001 - \$15,000	
NY's Advisor-Guided College Savings Program: JP Morgan 529 Age-Based 0-5 Portfolio A for DC 2 [OT] LOCATION: US DESCRIPTION: Contribution to college savings plan for DC2. Filer has no control over investment decisions.	DC	01/28/2022	P	\$1,001 - \$15,000	
Schwab Strat. Tr. Inter.-Term US Treasury (SCHR) [EF]	JT	06/6/2022	P	\$1,001 - \$15,000	
Schwab Strategic Trust Short-Term US Treasury (SCHO) [EF]	JT	02/1/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Schwab Strategic Trust Short-Term US Treasury (SCHO) [EF]	JT	10/6/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Schwab Strategic Trust Short-Term US Treasury (SCHO) [EF]	JT	10/6/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Six Circles Int'l Unconstrained Equity Fund (CUSUX) [MF] DESCRIPTION: Reinvestment	JT	12/16/2022	P	\$1,001 - \$15,000	
Six Circles Trust Credit Opportunities Fund (CRDOX) [MF]	JT	06/14/2022	P	\$1,001 - \$15,000	
Six Circles Trust Credit Opportunities Fund (CRDOX) [MF]	JT	10/6/2022	P	\$1,001 - \$15,000	
Six Circles Trust Credit Opportunities Fund (CRDOX) [MF]	JT	02/15/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Six Circles US Unconstrained Equity Fund (CIUEX) [MF] DESCRIPTION: Reinvestment	JT	12/16/2022	P	\$1,001 - \$15,000	
Vanguard Municipal Tax Exempt Bond ETF (VTEB) [EF]	JT	10/6/2022	P	\$1,001 - \$15,000	
Vanguard Scottsdale Funds Intermediate Term Treas. ETF (VGIT) [EF]	JT	08/5/2022	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
Cooley LLP (Law Firm)	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	PNC Bank	09/2020	Mortgage on Personal Residence; Dallas, TX	\$250,001 - \$500,000

COMMENTS: The mortgage, which was previously held by First Horizon Bank, was acquired by PNC Bank on 9/1/2022.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2007	Filer and NFL	As reported and described on Schedule A, Filer is an inactive participant in the following retirement and annuity plans associated with his time as a player in the NFL: Bert Bell/Pete Rozelle NFL Player Retirement Plan; NFL Player Second Career Savings Plan 401k; and NFL Player Annuity Program Trust.
May 2015	Filer and Perkins Coie (Law Firm)	As reported and described on Schedule A, Filer is an inactive participant in the Perkins Coie Salary Deferral Plan.

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

- Cleary Gottlieb Fidelity Retirement Plan (Owner: SP)
- Cooley LLP Salary Deferral & Profit Sharing Plan (Owner: SP)

- Legal Aid of NorthWest Texas 401K Thrift Plan (Owner: SP)
- NFL Player Second Career Savings Plan 401(k) Savings Plan
- Perkins Coie Salary Deferral Plan

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

COMMENTS

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. Colin Allred , 05/15/2023