



Filing ID #10053883

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Sylvia Garcia  
**Status:** Member  
**State/District:** TX29

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 09/12/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
BlackRock Lifepath Index Retirement Fund F [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ American Century Equity Income [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ American Funds US Government Securities [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ BlackRock EAFE Equity Index [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ BlackRock Equity Index [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ BlackRock Russell 2000 Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Cohen & Steers Realty Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Fidelity Balanced Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
City of Houston Def Comp 457 Plan ⇒ Fidelity Mid Cap Index [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Houston Fixed Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Invesco Diversified Dividend [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ JP Morgan US Research Enhanced Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ PIMCO Total Return Admin [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Vanguard International Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Western Asset Core Plus Bond [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Congressional Federal Credit Union accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Farm in Palito Blanco, TX (14 acres) [FA]  LOCATION: Jim Wells County, TX, US DESCRIPTION: Farm crop is Grain Sorghum		\$15,001 - \$50,000	Rent	\$1 - \$200	<input type="checkbox"/>
Harris County Federal Credit Union [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Harris County Texas 457 Deferred Compensation Plan ⇒ VALIC Fixed Income [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Land in Palito Blanco, TX (1 acre) [RP]  LOCATION: Jim Wells County, TX, US		\$15,001 - \$50,000	None		<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?
City of Houston Def Comp 457 Plan ⇒ American Funds Sec R6 [MF]		06/27/2022	P	\$1,001 - \$15,000	
City of Houston Def Comp 457 Plan ⇒ BlackRock EAFE Equity Index Coll F [MF]		06/27/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ BlackRock EAFE Equity Index Coll F [MF]		09/6/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ BlackRock Equity Index [MF]		06/27/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Columbia Small Cap Value [MF]		03/7/2022	P	\$1,001 - \$15,000	
City of Houston Def Comp 457 Plan ⇒ Columbia Small Cap Value II [MF]		09/6/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Fidelity Balanced Fund [MF]		03/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Fidelity Balanced Fund [MF]		06/27/2022	P	\$1,001 - \$15,000	
City of Houston Def Comp 457 Plan ⇒ Fidelity Balanced Fund [MF]		09/6/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Houston Fixed Fund [MF]		03/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Houston Fixed Fund [MF]		06/27/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ INVESCO Diversified Dividend R% [MF]		03/7/2022	P	\$1,001 - \$15,000	
City of Houston Def Comp 457 Plan ⇒ INVESCO Diversified Dividend R5 [MF]		06/27/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒		06/27/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JP Morgan US Research Enhanced Equity I [MF]					
City of Houston Def Comp 457 Plan ⇒ PIMCO Total Return Admin [MF]		06/27/2022	P	\$1,001 - \$15,000	
City of Houston Def Comp 457 Plan ⇒ PIMCO Total Return Admin [MF]		09/6/2022	P	\$1,001 - \$15,000	
City of Houston Def Comp 457 Plan ⇒ Vanguard Int Growth [MF]		03/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
City of Houston Def Comp 457 Plan ⇒ Western Asset Core Plus Bond [MF]		06/27/2022	S (partial)	\$1,001 - \$15,000	<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 C: EARNED INCOME

Source	Type	Amount
Houston Municipal Employees Pension System	Pension Distribution	\$63,810.36
Texas County and District Retirement System	Pension Distribution	\$30,981.72
Employees Retirement System of Texas	Pension Distribution	\$19,320.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Harris County Federal Credit Union	April 1988	Home Equity loan	\$10,000 - \$15,000
	Congressional Federal Credit Union	September 2019	Mortgage on Galveston property	\$100,001 - \$250,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2008	Myself and the Houston Municipal Employees Pension System	Participation in Defined Benefit Plan
December 2012	Myself and the Texas County and District Retirement System	Participation in Defined Benefit Plan
February 2019	Myself and the Employees Retirement System of Texas	Participation in Defined Benefit 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

- City of Houston Def Comp 457 Plan
- Harris County Texas 457 Deferred Compensation Plan  
LOCATION: US

## 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. Sylvia Garcia , 09/12/2023