MARCO RUBIO

SECRETARY OF THE SENATE

311ELS neuzz g

**VOM 6102** 8 PM 12: 19

WASHINGTON, DC 20510

November 8, 2019

FOREIGN RELATIONS

SMALL BUSINESS AND ENTREPRENEURSHIP

SPECIAL COMMITTEE ON AGING

Julie E. Adams 232 Hart Senate Office Building Secretary Washington, D.C. 20510-7116 of the Senate

## Dear Secretary Adams:

children's 529 education savings plans owned by my spouse In reviewing my financial disclosure reports from previous years, I discovered reporting errors related to my that I would like to correct for the record.

2016, and 2017 Below are amendments I would like to make to my financial disclosure reports for calendar years 2014, 2015,

- For calendar year 2014, under Part 3 (Assets), should read "Age Based Option: Age 10-12 Based Option: Age 10-12 Class B" (mutual (Education Savings Plans - 529 College (mutual fund). Class A" Saving Plan) and include two sub-assets: Sub-asset 5.1 Class A" (mutual fund) and Sub-asset 5.2 should read "Age Asset 1 number 5 should read "Age Based Option: Age 10-
- should read "Age Based Option: Based Option: Age 13-15 Class B" For calendar year 2014, under Part 3 (Assets), Asset 115" (Education Savings Plans - 529 College Saving F Age 13-15 (mutual fund). Class A" number 6 should read "Age Based Option: Age 13-lan) and include two sub-assets: Sub-asset 6.1 (mutual fund) and Sub-asset 6.2 should read "Age
- should read "Age Based Option: Age 13-15 Based Option: Age 13-15 Class B" For calendar year 2015, under Part 3 (Assets), Asset number 5 should read "Age Based Option: Age 13-15" (Education Savings Plans - 529 College Saving Plan) and include two sub-assets: Sub-asset 5.1 (mutual fund). Class A" (mutual fund) and Sub-asset 5.2 should read "Age
- The following four transactions occurred:
- June \$1,001 1, 2015 and \$15,000 Full sale of Age-Based Option: Age 10-12 Class A in an amount between

- $\odot$ June 1, \$1,001 and \$15,000. 2015: Full sale of Age-Based Option: Age 10-12 Class B in an amount between
- \$1,001 June 1, 2015: Purchase of Age-Based and \$15,000. Option: Age 13-15 Class A in an amount between
- June \$1,001 and \$15,000. 1, 2015: Purchase of Age-Based Option: Age 13-15 Class B in an amount between
- should read "Age Based Option: Age 13-15 Based Option: 15" (Education Savings Plans - 529 College Saving Plan) and include two sub-assets: Sub-asset 6.1 should read "Age Based Option: Age 13-15 Class A" (mutual fund) and Sub-asset 6.2 should read "Age calendar year 2015, Age 13-15 Class B" under Part 3 (Assets), (mutual fund) number 6 should read "Age Based Option: Age 13-

- should read "Age Based Option: For calendar year 2016, under Part 3 (Assets), Asset number 5 should read "Age Based Option: Age 13-15" (Education Savings Plans - 529 College Saving Plan) and include two sub-assets: Sub-asset 5.1 Based Option: Age 13-15 Class B" Age 13-15 (mutual fund). Class A" (mutual fund) and Sub-asset 5.2 should read "Age
- should read "Age Based Option: Based Option: calendar year 2016, (Education Savings Plans - 529 College Saving Plan) and include two sub-assets: Sub-asset 6.1 Age 16-18 Class B" under Part 3 (Assets), Age 16-18 (mutual fund). Class A" Asset 1 number 6 should read "Age Based Option: Age 16-(mutual fund) and Sub-asset 6.2 should read "Age
- The following four transactions occurred:
- $\Xi$ April 1, \$1,001 and \$15,000 2016: Full sale of Age-Based Option: Age 13-15 Class A in an amount between
- $\odot$ \$1,001 April 1, and \$15,000: 2016: Full sale of Age-Based Option: Age 13-15 Class B in an amount between
- \$1,001 April 1, 2016: Purchase and \$15,000. of Age-Based Option: Age 16-18 Class A in an amount between
- April 1, \$1,001 and \$15,000. 2016: Purchase of Age-Based Option: Age 16-18 Class B in an amount between
- 15" (Education Savings Plans 529 College Saving Plan) and include two sub-assets: Sub-asset 5.1 should read "Age Based Option: Age 13-15 Class A" (mutual fund) and Sub-asset 5.2 should read "Age Based Option: Age 13-15 Class B" calendar year 2017, under Part 3 (Assets), (mutual fund). Asset number 5 should read "Age Based Option: Age 13-
- should read "Age Based Option: Age 16-18 Based Option: Age 16-18 Class B" (mutual For calendar year 2017, under Part 3 (Assets), (Education Savings Plans - 529 College (mutual fund). Class A" Saving Asset number 6 should read "Age Based Option: Age 16-Plan) and (mutual fund) and Sub-asset 6.2 should read "Age include two sub-assets: Sub-asset 6.

Sincerely,

Marco Rubio
United States Senator