Filing ID #10009992

Financial Disclosure Report

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Filer Information

Name: Hon. Grace Meng
Status: Member
State/District: NY06

Filing Information

Filing Type: Amendment Report
Filing Year: 2014
Filing Date: 08/13/2018

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
147-14 34th Avenue Realty ⇒ 147-14 34th Avenue [RP]		None	None		
Location: Flushing, NY, US Description: Property at 147-14 34 Avenue was recorded as a property distribution to a third party on 1/1/2014 and subsequently sold by third party on 3/7/2014. Comments: The sale by the third party was a 1031 exchange. Therefore, no capital gains were reported. The filer had no interest in the sale.					
147-14 34th Avenue Realty ⇒ 41-33 Parsons Blvd #1A [RP]		$1,001 - $15,000	None		
Location: Flushing, NY, US					
147-14 34th Avenue Realty ⇒ 41-33 Parsons Blvd #1B [RP]		$1,001 - $15,000	None		
Location: Flushing, NY, US					
41-40 Union Street [RP]		None	Capital Gains, Rent	$50,001 - $100,000	✓
Location: Flushing, NY, US Description: Property includes rental condominium unit and parking space.					
ACM Development LLC [RP]		$15,001 - $50,000	Partnership Income	$1,001 - $2,500	
Location: Flushing, NY, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
DESCRIPTION: Property at: 34-40 Collins Place Flushing, NY 11355					
Bank of America accounts [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	
Chinatrust Banks, USa [BA]		$1,001 - $15,000	Interest	$1 - $200	
Exelis Inc. Common Stock New (XLS) [ST]		$1,001 - $15,000	Dividends	$1 - $200	✓
General Electric Company (GE) [ST]	SP	$1,001 - $15,000	Dividends	$1 - $200	
HSBC [BA]		$1,001 - $15,000	Interest	$1 - $200	
Intel Corporation (INTC) [ST]	SP	$1,001 - $15,000	Dividends	$1 - $200	
John Hancock Life Insurance Limited Payment Whole Life [WU]		$1,001 - $15,000	Tax-Deferred		
Johnson & Johnson (JNJ) [ST]	SP	$1,001 - $15,000	Dividends	$1 - $200	
MetLife IRA-BlackRock Energy & Resources Portfolio [IH]		$1,001 - $15,000	Tax-Deferred		
NY 529 (DC1) ⇒ NY 529 Vanguard Plan (DC1) Aggressive Growth Portfolio [5P] LOCATION: NY	DC	$15,001 - $50,000	Tax-Deferred		
NY 529 (DC1) ⇒ NY 529 Vanguard Plan (DC1) MidCap Stock Index Portfolio [5P] LOCATION: NY	DC	$1,001 - $15,000	Tax-Deferred		
NY 529 (DC2) ⇒ NY 529 Vanguard Plan (DC2) Aggressive Growth Portfolio [5P] LOCATION: NY	DC	$15,001 - $50,000	Tax-Deferred		
NY 529 (DC2) ⇒ NY 529 Vanguard Plan (DC2) MidCap Stock Index Portfolio [5P] LOCATION: NY	DC	$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
NY Life Insurance Company - Whole Life [WU]		$1,001 - $15,000	Tax-Deferred		
Procter & Gamble Company (PG) [ST]	SP	$1,001 - $15,000	Dividends	$1 - $200	
Prudential IRA ⇒ Prudential International Value Fund [IH]		$1,001 - $15,000	Tax-Deferred		
Prudential IRA ⇒ Target Growth Allocation B Fund [IH]		$1,001 - $15,000	Tax-Deferred		
Prudential Roth IRA ⇒ Invesco Van Kampen Value Opportunities Fund [IH]		$1,001 - $15,000	Tax-Deferred		
Prudential Roth IRA ⇒ Prudential Jennison Health Sciences Fund [IH]		$1,001 - $15,000	Tax-Deferred		
SPDR S&P Dividend ETF (SDY) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	
SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	
SPDR Select Sector Fund - Technology (XLK) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	
TD Bank [IH]		$1,001 - $15,000	Interest	$1 - $200	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ TIAA Real Estate [FN]	SP	$1 - $1,000	Tax-Deferred		
TIAA-CREF Group Supplemental Retirement Annuity ⇒ TIAA-CREF Lifecycle 2040 Fund [FN]	SP	$1,001 - $15,000	Tax-Deferred		
TIAA-CREF Retirement Annuity - TIAA Real Estate [FN]	SP	$15,001 - $50,000	Tax-Deferred		
Vanguard 403b ⇒ Vanguard Total Bond Market Index Fund [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Vanguard 403b ⇒ Vanguard Total International Stock Index Fund [MF]	SP	$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Vanguard 403b ⇒ Vanguard Total Stock Market Index Fund [MF]	SP	$50,001 - $100,000	Tax-Deferred		☐
Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☐
Vanguard FTSEEuropean ETF (VGK) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☐
Vanguard Large-Cap ETF - DNQ (VV) [ST]	SP	$1,001 - $15,000	Dividends	$1 - $200	☐
Vanguard Small-Cap ETF - DNQ (VB) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☐
Wealth Management LLC (10%) [RP] LOCATION: Flushing, NY, US DESCRIPTION: Property at: 132-15 35th Avenue Flushing, NY 11354		$50,001 - $100,000	Partnership Income	$1 - $200	☐

* 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?
147-14 34th Avenue Realty (3%) [OT] LOCATION: US DESCRIPTION: Property at 147-14 34 Avenue was sold on March 7, 2014.		03/7/2014	S	$500,001 - $1,000,000	☐
41-40 Union Street [RP] LOCATION: Flushing, NY, US DESCRIPTION: Property includes rental condominium unit and parking space.		11/3/2014	S	$250,001 - $500,000	☑
Exelis Inc. Common Stock New (XLS) [ST]		01/8/2014	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
New York University	spouse salary	N/A

Source	Type	Amount
Wayne Kye, DDS	spouse salary	N/A
J & E Educational Consulting, Inc.	spouse speech honorarium	$400.00
North American Taiwanese Medical Association	spouse speech honorarium	$500.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of America, N.A.	October 2006	Mortgage on primary residence	$100,001 - $250,000
SP	Sallie Mae, PA	November 2004	Student loan	$100,001 - $250,000
JT	Bank of America, N.A.	May 2014	Home equity line of credit (HELOC)	$250,001 - $500,000

Schedule E: Positions

Position	Name of Organization
Secretary, Treasurer	Greater Purpose Foundation

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.

Schedule A and B Asset Class Details

- 147-14 34th Avenue Realty (3% Interest)
  Location: Flushing, NY, US
- NY 529 (DC1) (Owner: DC)
  Location: NY

- NY 529 (DC2) (Owner: DC)
  Location: NY
- Prudential IRA
- Prudential Roth IRA
- TIAA-CREF Group Supplemental Retirement Annuity (Owner: SP)
- Vanguard 403b (Owner: SP)

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

[x] 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. Grace Meng , 08/13/2018