



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Barbara Lee
Status: Member
State/District: CA13

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2017
Filing Date: 05/15/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
AIG Polaris Choice IV Variable Annuity (formerly SunAmerica) ⇒ Sun America Secure Value Account [OT] DESCRIPTION: Variable Annuity		\$15,001 - \$50,000	None	<input type="checkbox"/>
AIG Polaris Choice IV Variable Annuity (formerly SunAmerica) ⇒ SunAmerica Dynamic Allocation Portfolio [OT] DESCRIPTION: Variable Annuity		\$50,001 - \$100,000	None	<input type="checkbox"/>
AIG Polaris Choice IV Variable Annuity (formerly SunAmerica) ⇒ SunAmerican Dynamic Strategy Portfolio [OT] DESCRIPTION: Variable Annuity		\$50,001 - \$100,000	None	<input type="checkbox"/>
Book contract with Rowman & Littlefield Publishers, Inc. (Approved by Committee) [OT] DESCRIPTION: Book contract		Undetermined	None	<input type="checkbox"/>
Charles Schwab Checking and Money Market Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200 <input type="checkbox"/>
East West Bank Accounts, Oakland, CA [BA]		\$1,001 - \$15,000	Interest	\$1 - <input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
				\$200
Fidelity SEP IRA ⇒ Delaware SMID Cap Growth Class C Fund [OT]		None	None	<input type="checkbox"/>
DESCRIPTION: IRA fund closed in 2017 and remaining funds rolled over to TSP.				
Fidelity SEP IRA ⇒ Fidelity Freedom 2020 Fund [OT]		None	None	<input type="checkbox"/>
DESCRIPTION: IRA fund closed in 2017 and remaining funds rolled over to TSP.				
Fidelity SEP IRA ⇒ Mass Investors Growth Fund [OT]		None	None	<input type="checkbox"/>
DESCRIPTION: IRA fund closed in 2017 and remaining funds rolled over to TSP.				
Healthcare Trust of America, Inc. Class A (HTA) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Met Life Variable Annuity Fund ⇒ American Funds Growth Portfolio [OT]		\$1,001 - \$15,000	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity				
Met Life Variable Annuity Fund ⇒ Clearbridge Aggressive Growth Portfolio [OT]		\$1,001 - \$15,000	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity				
Met Life Variable Annuity Fund ⇒ Goldman Sachs Mid Cap Value Portfolio [OT]		\$1,001 - \$15,000	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity				
Met Life Variable Annuity Fund ⇒ Invesco Small Cap Growth Portfolio [OT]		\$1,001 - \$15,000	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity				
Met Life Variable Annuity Fund ⇒ Met Life Annuity Fund General Account [OT]		\$1,001 - \$15,000	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity				
Met Life Variable Annuity Fund ⇒ Met Life Asset Allocation 100 Portfolio [OT]		\$1,001 - \$15,000	None	<input type="checkbox"/>
DESCRIPTION: Variable Annuity				
Wells Fargo Bank Checking Account [BA]		\$1 - \$1,000	None	<input type="checkbox"/>
Wright-Patman Congressional Credit Union Checking and Savings Accounts [BA]		\$1 - \$1,000	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
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* 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

None disclosed.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Credit Union Mortgage Association	January 2011	Mortgage on DC Condo Residence	\$250,001 - \$500,000
	Wright-Patman Congressional Federal Credit Union, DC	June 2012	Loan and line of credit	\$15,001 - \$50,000
	Wells Fargo Bank	July 2012	Mortgage on Palm Deser, CA Condo Residence	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member, Congressional Advisory Council	The Faith and Politics Institute (Nonprofit Public Benefit Corporation)
Board Member	WILL/WAND (Nonprofit Public Benefit Corporation)
Board Member	Project Vote Smart (Nonprofit Public Benefit Corporation)
Trustee	Ghana Children's Found (a project of the East Bay Community Foundation)
Board Member	ProgressiveCaucus.org (Nonprofit Public Benefit Corporation)
Member, Honorary Board of Advisors	National Student Leadership Conference (Nonprofit Public Benefit Corporation)
Member, Congressional Advisory Board	The Humpty Dumpty Institute (Nonprofit Public Benefit Corporation)
Member, Advisory Council	Dellums Institute (Nonprofit Public Benefit Corporation)
Member, Advisory Board	Grand Lakes Gardens Senior Living Community
Member, Advisory Board	Swords to Plowshares (Nonprofit Public Benefit Corporation)
Member, Congressional Council	Women's Information Network (WIN)(Nonprofit Public Benefit Corporation)

Position	Name of Organization
Trustee	American Baptist Seminary of the West
Board Member	Stiles Hall (Nonprofit Public Benefit Corporation)

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Progressive Caucus	02/3/2017	02/5/2017	Washington DC - Baltimore - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
German Marshall Fund of the United States	02/18/2017	02/23/2017	San Francisco - Munich - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COMMENTS: Full name of source of payment: German Marshall Fund of the United States, Robert Bosch Stiftung. City of Departure and City of Return for Accompanying Relative: Los Angeles, California.							
Congressional Black Caucus Institute	03/30/2017	04/2/2017	Washington DC - Charleston - Charleston	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The Technology and Culture Forum-Radius at MIT	05/6/2017	05/8/2017	Washington DC - Boston - San Francisco	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
J Street Educational Fund	06/30/2017	07/7/2017	Washington DC - Tel Aviv - Jerusalem - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Congressional Black Caucus Political & Leadership Institute	08/10/2017	08/13/2017	Washington DC - Tunica - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
COMMENTS: Full name of sponsor: Congressional Black Caucus Political Education and Leadership Institute							
United Nations Foundation	04/30/2017	05/1/2017	San Francisco - New York City - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- AIG Polaris Choice IV Variable Annuity (formerly SunAmerica)
- Fidelity SEP IRA
LOCATION: US
- Met Life Variable Annuity Fund

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. Barbara Lee , 05/15/2018