Filing ID #10021356

Financial Disclosure Report

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

Filer Information

Name: Hon. Edward R. Royce
Status: Member
State/District: CA39

Filing Information

Filing Type: Annual Report
Filing Year: 2017
Filing Date: 05/9/2018

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Congressional Federal Credit Union (checking/savings account) ⇒ Cash [OT]	JT	$50,001 - $100,000	None		
Description: Checking and Savings Accounts					
Fidelity Rollover IRA ⇒ Fidelity Advisor Europe Fund [IH]	SP	$1,001 - $15,000	Tax-Deferred		
Description: Spouse IRA					
Fidelity Rollover IRA ⇒ Fidelity Advisor Global Balanced Fund [IH]	SP	$1,001 - $15,000	Tax-Deferred		
Description: Spouse IRA					
Fidelity Rollover IRA ⇒ Fidelity Advisor High Income Advantage Fund [IH]	SP	$1,001 - $15,000	Tax-Deferred		
Description: Spouse IRA					
Fidelity Rollover IRA ⇒ Fidelity Advisor Large Cap [IH]	SP	$15,001 - $50,000	Tax-Deferred		
Description: Spouse IRA					
Fidelity Rollover IRA ⇒ Fidelity Advisor Mid Cap [IH]	SP	$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
DESCRIPTION: Spouse IRA					
Fidelity Rollover IRA ⇒ Fidelity Advisor Real Estate Income Fund [IH] DESCRIPTION: Spouse IRA	SP	$1,001 - $15,000	Tax-Deferred		☐
Fidelity Rollover IRA ⇒ Fidelity Advisor Small Cap [IH] DESCRIPTION: Spouse IRA	SP	$15,001 - $50,000	Tax-Deferred		☐
Fidelity Rollover IRA ⇒ Fidelity Advisor Stock Selector Fund [IH] DESCRIPTION: Spouse IRA	SP	$15,001 - $50,000	Tax-Deferred		☐
Fidelity Rollover IRA ⇒ Fidelity Advisor Value Strategy [IH] DESCRIPTION: Spouse IRA	SP	$15,001 - $50,000	Tax-Deferred		☐
Fidelity Rollover IRA ⇒ Fidelity Government Money Market [IH] DESCRIPTION: Spouse IRA	SP	$1 - $1,000	None		☐
Fidelity Rollover IRA ⇒ Fidelity Mid Cap Value [IH] DESCRIPTION: Spouse IRA	SP	$15,001 - $50,000	Tax-Deferred		☐
Nokia Savings/401(K) Plan ⇒ Fidelity Mutual Fund - Equity Index Fund [MF] DESCRIPTION: Spouse 401K	SP	$100,001 - $250,000	Tax-Deferred		☐
Nokia Savings/401(K) Plan ⇒ Fidelity Mutual Fund - International Equity Index [MF] DESCRIPTION: Spouse 401K	SP	$15,001 - $50,000	Tax-Deferred		☐
Nokia Savings/401(K) Plan ⇒ Fidelity Mutual Fund - US Large Cap Growth Equity [MF] DESCRIPTION: Spouse 401K	SP	$50,001 - $100,000	Tax-Deferred		☐
Nokia Savings/401(K) Plan ⇒ Fidelity Mutual Fund - US Small Cap Equity Fund [MF] DESCRIPTION: Spouse 401K	SP	$100,001 - $250,000	Tax-Deferred		☐
Nokia Savings/401(K) Plan ⇒ Fidelity Mutual Fund- Bond Fund [MF] DESCRIPTION: Spouse 401K	SP	$15,001 - $50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Nokia Savings/401(K) Plan ⇒ Fidelity Mutual Fund -International Equity [MF] DESCRIPTION: Spouse 401K	SP	$15,001 - $50,000	Tax-Deferred		☐

* 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

Source	Type	Amount
MedicusTek USA Corp.	Spouse Income	N/A
Nokia Retirement Income plan	Spouse IRA distribution	N/A
Nokia Savings/401K	Spouse 401K Distribution	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Congressional Federal Credit Union	April 2009	Alexandria, VA	$250,001 - $500,000
JT	Congressional Federal Credit Union	April 2009	Mortgage on residence in Fullerton, CA	$500,001 - $1,000,000
JT	Congressional Federal Credit Union	March 2014	HELOC on personal residence	$100,001 - $250,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

Schedule G: Gifts

None disclosed.

Schedule H: Travel Payments and Reimbursements

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Education Foundation (AIEF)	08/13/2017	08/20/2017	Bucharest - Tel Aviv - Los Angeles	0	☑	☑	☑

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Asset Class Details

- Congressional Federal Credit Union (checking/savings account) (Owner: JT)
- Fidelity Rollover IRA (Owner: SP)
  Description: Spouse IRA
- Nokia Savings/401(K) Plan (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

☑ 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. Edward R. Royce , 05/9/2018