



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Dr. Kim Schrier
Status: Congressional Candidate
State/District: WA08

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/15/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
David's IRA ⇒ Apple Inc. (AAPL) [ST]	SP	\$250,001 - \$500,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
David's IRA ⇒ Money Market [BA]	SP	\$1,001 - \$15,000	None		
David's IRA ⇒ Tesla, Inc. (TSLA) [ST]	SP	\$50,001 - \$100,000	None		
Gowing Family Secondary Account ⇒ Apple Inc. (AAPL) [ST]	JT	\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$100,001 - \$1,000,000
Gowing Family Secondary Account ⇒ Money Market Acct [BA]	JT	\$100,001 - \$250,000	None		
Gowing Family Secondary Account ⇒ Tesla, Inc. (TSLA) [ST]	JT	\$50,001 - \$100,000	None		
Gowing Family Trust Primary Account ⇒ Apple Inc. (AAPL) [ST]	JT	\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	\$15,001 - \$50,000
Gowing Family Trust Primary Account ⇒	JT	None	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apple Inc. Call: Buy to Close for a loss [OP]					
DESCRIPTION: Bought back to close the options at a loss.					
Gowing Family Trust Primary Account ⇒ Applied Materials, Inc. (AMAT) [ST]	JT	None	Capital Gains	None	\$2,501 - \$5,000
Gowing Family Trust Primary Account ⇒ Cash [BA]	JT	\$1,001 - \$15,000	None		
Gowing Family Trust Primary Account ⇒ Cisco Systems, Inc. (CSCO) [ST]	JT	None	Capital Gains	None	\$2,501 - \$5,000
Gowing Family Trust Primary Account ⇒ Dell Technologies Inc. Class V (DVMT) [ST]	JT	None	Capital Gains	None	\$201 - \$1,000
Gowing Family Trust Primary Account ⇒ Home Depot, Inc. (HD) [ST]	JT	None	Capital Gains, Dividends	\$15,001 - \$50,000	\$201 - \$1,000
Gowing Family Trust Primary Account ⇒ iShares Cohen & Steers REIT ETF [EF]	JT	None	Dividends	None	\$1,001 - \$2,500
Gowing Family Trust Primary Account ⇒ iShares Cohen & Steers REIT ETF [EF]	JT	None	Capital Gains	\$2,501 - \$5,000	None
Gowing Family Trust Primary Account ⇒ iShares Core US Aggregate Bond ETF [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Gowing Family Trust Primary Account ⇒ iShares TR S&P US PFD STK [EF]	JT	None	Dividends	None	\$201 - \$1,000
Gowing Family Trust Primary Account ⇒ Powershares QQQQ NASDAQ 100 [EF]	JT	None	Capital Gains	None	\$5,001 - \$15,000
Gowing Family Trust Primary Account ⇒ Schwab US REIT ETF [EF]	JT	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Gowing Family Trust Primary Account ⇒ Select Sector SPDR Trust En [EF]	JT	None	Capital Gains	None	\$5,001 - \$15,000
Gowing Family Trust Primary Account ⇒ TDAM 2 MM PORT INVESTOR CL [MF]	JT	\$1 - \$1,000	None		
Gowing Family Trust Primary Account ⇒ Vanguard FTSE Developed Markets ETF [EF]	JT	None	Capital Gains, Dividends	\$15,001 - \$50,000	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Gowing Family Trust Primary Account ⇒ Vanguard High Dividend Yield ETF [EF]	JT	None	Capital Gains	\$5,001 - \$15,000	\$2,501 - \$5,000
Gowing Family Trust Primary Account ⇒ Vanguard High Dividend Yield ETF [EF]	JT	None	Dividends	None	\$1,001 - \$2,500
Gowing Family Trust Primary Account ⇒ Vanguard Real Estate ETF [EF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	None
DESCRIPTION: Sold for a loss that exceeded the dividend income; however, dividend income is required to be reported here.					
Kim's 401(a) with VMMC ⇒ DFA International Social Core EQ Instl [EF]		\$50,001 - \$100,000	None		
Kim's 401(a) with VMMC ⇒ Fidelity Government Cash Reserves [BA]		\$1 - \$1,000	None		
Kim's 401(a) with VMMC ⇒ iShares Core US Aggregate Bond ETF [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	None
Kim's 401(a) with VMMC ⇒ iShares TR S&P US PFD STK [EF]		None	Dividends	None	\$1,001 - \$2,500
Kim's 401(a) with VMMC ⇒ SPDR SER TR Bloomberg SRT TR [EF]		None	Dividends	None	\$5,001 - \$15,000
Kim's 401(a) with VMMC ⇒ Vanguard Scottsdale FDS Intermediate [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Kim's 403b - Pre-2009 ⇒ FID Diversified International [MF]		\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
Kim's 403b - Pre-2009 ⇒ FID Dividend Growth [MF]		\$50,001 - \$100,000	Dividends	None	\$5,001 - \$15,000
Kim's 403b - Pre-2009 ⇒ FID Intermed Bond [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Kim's 403b - Pre-2009 ⇒ FID Low Priced Stk [MF]		\$50,001 - \$100,000	Dividends	None	\$2,501 - \$5,000
Kim's 403b - Pre-2009 ⇒ FID OTC Portfolio [MF]		\$100,001 - \$250,000	Dividends	None	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Kim's 403b with VMMC ⇒ DFA Intl Real Estate Sec Portfolio [MF]		None	Dividends	None	\$2,501 - \$5,000
Kim's 403b with VMMC ⇒ Fidelity Government Cash Reserves [BA]		\$1,001 - \$15,000	None		
Kim's 403b with VMMC ⇒ Fidelity Real Estate Index Premium CL [MF]		None	Dividends	None	\$201 - \$1,000
Kim's 403b with VMMC ⇒ Fidelity US Bond Index Premium Class [MF]		None	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Kim's 403b with VMMC ⇒ VANGUARD INTERMED TRM INVST GR ADMIRAL [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	None
Kim's Roth IRA - 2014 ⇒ DFA Emerging Markets Social Core Equity Portfolio [MF]		\$15,001 - \$50,000	None		
Kim's Roth IRA - 2014 ⇒ DFA International Social Core Equity Portfolio Instl Class [MF]		\$15,001 - \$50,000	None		
Kim's Roth IRA - 2014 ⇒ Money Market [BA]		\$1,001 - \$15,000	None		
Kim's Roth IRA - 2014 ⇒ Schwab US REIT ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Kim's Roth IRA - 2014 ⇒ SPDR Energy Select Sector [EF]		None	Dividends	None	\$2,501 - \$5,000
Samuel Gowing Trust ⇒ Cash [BA]		\$1,001 - \$15,000	None		
Samuel Gowing Trust ⇒ DFA Emerging Markets Social Core Equity Portfolio [MF]		\$15,001 - \$50,000	None		
Samuel Gowing Trust ⇒ DFA International Social Core Equity Portfolio Instl Class [MF]		\$15,001 - \$50,000	None		
Samuel Gowing Trust ⇒		\$15,001 - \$50,000	Dividends	\$1 - \$200	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DFA US Social Core Equity 2 Portfolio [MF]					
Samuel Gowing Trust ⇒ iShares Core S&P 500 ETF [EF]		None	Dividends	None	\$201 - \$1,000
Samuel Gowing Trust ⇒ iShares Core US Aggregate Bond ETF [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$201 - \$1,000
Samuel Gowing Trust ⇒ Select Sector SPDR Trust En [EF]		None	Capital Gains	None	\$201 - \$1,000
Samuel Gowing Trust ⇒ SPDR Portfolio Aggregate Bond ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Samuel Gowing Trust ⇒ SPDR SER TR Bloomberg SRT TR [EF]		None	Dividends	None	\$201 - \$1,000
Samuel Gowing Trust ⇒ SPDR Series Trust Portfolio Large Cap ETF [EF]		None	Capital Gains	\$201 - \$1,000	None
Samuel Gowing Trust ⇒ TIAA-CREFF Social Choice Equity Fund Inst Cl [MF]		\$15,001 - \$50,000	None		
Samuel Gowing Trust ⇒ Vanguard CRSP US Mid Cap Index [EF]		None	Capital Gains, Dividends	\$5,001 - \$15,000	\$201 - \$1,000
Samuel Gowing Trust ⇒ Vanguard Emerging Markets ETF [EF]		None	Capital Gains, Dividends	\$5,001 - \$15,000	\$201 - \$1,000
Samuel Gowing Trust ⇒ Vanguard FTSE Developed Markets ETF [EF]		None	Capital Gains, Dividends	\$5,001 - \$15,000	\$1,001 - \$2,500
Samuel Gowing Trust ⇒ Vanguard FTSE Social Index Fund Investor Shares [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	None
Samuel Gowing Trust ⇒ Vanguard Mid-Cap ETF [EF]		None	Capital Gains	None	\$201 - \$1,000
Samuel Gowing Trust ⇒ Vanguard Real Estate ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Samuel Gowing Trust ⇒		None	Capital Gains,	\$2,501 - \$5,000	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Small Cap ETF [EF]			Dividends		
Samuel Gowing Trust ⇒ Vanguard Small-Cap Vipers [EF]		None	Capital Gains	None	\$1,001 - \$2,500
Wells Fargo Joint Checking Account 2017 [BA]	JT	\$15,001 - \$50,000	None		
DESCRIPTION: Joint checking account with my spouse.					
Wells Fargo joint checking account 2018 [BA]	JT	\$15,001 - \$50,000	None		
DESCRIPTION: Joint checking account with my spouse.					

* 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 Current Year to Filing	Amount Preceding Year
Virginia Mason Medical Center	Salary	\$.00	\$164,384.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo	August, 2012	Home mortgage	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Medical Doctor, Pediatrics	Virginia Mason Medical Center

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2017	Myself and Virginia Mason Medical Center	Leave of absence in order to pursue campaign for United States Congress. Period: 1/2/18 - 11/15/18.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- David's IRA (Owner: SP)
- Gowing Family Secondary Account (Owner: JT)
- Gowing Family Trust Primary Account (Owner: JT)
DESCRIPTION: Kimberly Schrier Gowing and David Noble Gowing Trustees
- Kim's 401(a) with VMMC
- Kim's 403b - Pre-2009
- Kim's 403b with VMMC
- Kim's Roth IRA - 2014
- Samuel Gowing Trust
DESCRIPTION: Trust for son's education

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Dr. Kim Schrier , 05/15/2018