



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Seth Moulton
Status: Member
State/District: MA06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
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SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
"Called to Serve: Learning to Lead in War and Peace," St. Martin's Press [OT]		Undetermined	Royalties	None	<input type="checkbox"/>
DESCRIPTION: The value of this asset is unascertainable. This is a book contract.					
Daughter's 529 ⇒ MA Portfolio 2036 (Fidelity Index) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ DWS Managed Municipal Bond Fund Institutional (SMLIX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Money Market Premium Class Fund (FZDXX) [MF]	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Global X FDS MLP & Energy Infrastructure ETF (MLPX) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒	JT	\$1,001 - \$15,000	Capital Gains,	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Invesco Oppenheimer Developing Markets Class A (ODMAX) [MF]			Dividends		
Fidelity Investments Transfer of Death Account ⇒ iShares Core S&P 500 ETF (IVV) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ iShares Short Term National Municipal Bond ETF (SUB) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ iShares TR MSCI UK ETF (EWU) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ John Hancock Disciplined Value Mid Cap Class A (JVMAX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Oakmark International Fund Investors Class (OAKIX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Oakmark Select Fund Investor Class (OAKLX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Parnassus Core Equity Fund - Institutional Shares (PRILX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ PRIMECAP Odyssey Growth Fund (POGRX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Schwab Fundamental EM L/C (FNDE) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ T Rowe Price Tax Free Income Fund (PATAX) [MF]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ TCW Emerging Markets Income Class I (TGEIX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Vanguard FTSE Developed Market ETF (VEA) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Vanguard Index FDS MID CAP (VO) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Investments Transfer of Death Account ⇒ Wasatch Small Cap Growth Fund Institutional Class (WIAEX) [MF]	JT	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Wells Fargo High Yield Municipal Bond Institutional (WHYIX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Wells Fargo Short Term Municipal Bond Fund Class A (WSMAX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ AMG Managers Fairpointe Mid Cap Fund Class I (ABMIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ AQR Long-Short Equity Fund Class N (QLENX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ DBX ETF TR/X-TRACKERS MSCI EAF (DBEF) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Eaton Vance Global Macro Absolute Return Fund Class I (EIGMX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Global X FDS MLP & Energy Infrastructure ETF (MLPX) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Invesco Oppenheimer Developing Markets Class A (ODMAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ iShares MSCI UK ETF (EWU) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ JP Morgan Exchange Traded FD BETBUILD (BBJP) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Liz: Fidelity Investments IRA#1 ⇒ Metropolitan West Total Return Bond Fund Class I (MWTIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Oakmark International Fund Investors Class (OAKIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Parnassus Core Equity Fund - Institutional Shares (PRILX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ PRIMECAP Odyssey Growth Fund (POGRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Schwab Fundamental EM L/C (FNDE) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ TCW Emerging Markets Income Class I (TGEIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Templeton Global Bond Fund Class A (TPINX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Bond Index Fund Long Term ETF (BLV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Bond Index Short Term ETF (BSV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Bond Index Total Bond Market ETF (BND) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard FTSE Developed Market ETF (VEA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Growth ETF (VUG) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Index FDS MID CAP (VO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Sector Index FDS Health Care (VHT) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Liz: Fidelity Investments IRA#1 ⇒ Vanguard World FDS Consumer Staples ETF (VDC) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Wasatch Small Cap Growth Fund Institutional Class (WIAEX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Fidelity Fund (FFIDX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Fidelity Magellan (FMAGX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ American Funds 2045 Target Date Retirement Fund Class A (AAHTX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Variable Life Insurance ⇒ MainStay Growth Allocation Fund [WU]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Niece's 529 Account ⇒ American Funds College 2033 Fund Class 529-A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ American Funds 2050 Target Date Retirement Fund Class A (AALTX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ AMG Managers Fairpointe Mid Cap Fund Class I (ABMIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ AQR Long-Short Equity Fund Class N (QLENX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ DBX ETF TR/X-TRACKERS MSCI EAF (DBEF) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Eaton Vance Global Macro Absolute Return Fund Class I (EIGMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Global X FDS MLP & Energy Infrastructure ETF (MLPX) [EF]					
Seth: Fidelity Investments Roth IRA ⇒ Invesco Oppenheimer Developing Markets Fund Class A (ODMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ iShares TR MSCI UK ETF (EWU) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ JP Morgan Exchange Traded FD BETBUILD (BBJP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Metropolitan West Total Return Bond Fund Class I (MWTIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Oakmark International Fund Investor Class (OAKIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Parnassus Core Equity Fund - Institutional Shares (PRILX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ PRIMECAP Odyssey Growth Fund (POGRX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Schwab Fundamental EM L/C (FNDE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Vanguard FTSE Developed Market ETF (VEA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Vanguard Growth ETF (VUG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Vanguard Index FDS MID CAP (VO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Vanguard Sector Index FDS Health Care (VHT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Seth: Fidelity Investments Roth IRA ⇒ Vanguard World FDS Consumer Staples ETF (VDC) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Wasatch Small Cap Growth Fund Investor Class (WAAEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spencer Stuart SSMC N.V. Class B restricted stock [PS]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: Spencer Stuart, 353 N. Clark, Suite 2500 Chicago, IL 60654 (Executive search and leadership consulting)					
Spencer Stuart SSMC N.V. Class B unvested restricted stock [PS]	SP	\$250,001 - \$500,000	None		<input type="checkbox"/>
DESCRIPTION: Spencer Stuart, 353 N. Clark, Suite 2500 Chicago, IL 60654 (Executive search and leadership consulting)					
Thea's 529 ⇒ NH Portfolio 2030 (Fidelity Funds) [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
USAA Checking [BA]	JT	\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>

* 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?
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	04/16/2019	P	\$50,001 - \$100,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	04/30/2019	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	05/7/2019	P	\$100,001 - \$250,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	05/8/2019	P	\$100,001 - \$250,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	05/10/2019	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒	JT	05/16/2019	P	\$100,001 -	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Government Money Market Fund (SPAXX) [MF]				\$250,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	05/22/2019	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	05/30/2019	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	06/19/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	07/19/2019	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	08/21/2019	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	10/16/2019	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	10/31/2019	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	05/22/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	05/24/2019	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	05/30/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	02/12/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	02/27/2019	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	03/12/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	03/29/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Investments Transfer of Death Account ⇒ Fidelity Money Market Premium Class Fund (FZDXX) [MF]	JT	04/30/2019	P	\$250,001 - \$500,000	
Fidelity Investments Transfer of Death Account ⇒ T Rowe Price Tax Free Income Fund (PATAX) [MF]	JT	05/24/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ T Rowe Price Tax Free Income Fund (PATAX) [MF]	JT	03/29/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Wells Fargo Short Term Municipal Bond Fund Class A (WSMAX) [MF]	JT	01/29/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ AMG Yacktman Focused Fund (YAFFX) [MF]	SP	01/4/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ AMG Yacktman Focused Fund (YAFFX) [MF]	SP	05/16/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ AQR Long Short Equity Class N (QLENX) [MF]	SP	01/4/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ DBX ETF TR/X-TRACKERS MSCI EAF (DBEF) [EF]	SP	01/7/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ DBX ETF TR/X-TRACKERS MSCI EAF (DBEF) [EF]	SP	05/17/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	05/22/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	05/30/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	01/4/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	01/7/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	05/22/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	05/24/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	05/30/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Global X FDS MLP & Energy Infrastructure ETF (MLPX) [EF]	SP	01/7/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	01/7/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ iShares Edge MSCI USA ETF (QUAL) [EF]	SP	01/7/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ iShares MSCI UK ETF (EWU) [EF]	SP	05/17/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ JP Morgan Exchange Traded BETBUILD (BBJP) [EF]	SP	05/17/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Metropolitan West Total Return Bond Fund Class I (MWTIX) [MF]	SP	01/4/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Oakmark Select Fund Institutional Class (OANLX) [MF]	SP	01/4/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Oakmark Select Fund Institutional Class (OANLX) [MF]	SP	05/24/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ PRIMECAP Odyssey Growth Fund (POGRX) [MF]	SP	01/4/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ PRIMECAP Odyssey Growth Fund (POGRX) [MF]	SP	05/16/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒	SP	01/7/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Schwab Fundamental EM L/C (FNDE) [EF]					
Liz: Fidelity Investments IRA#1 ⇒ T Rowe Price Institutional Floating Rate Fund (RPIFX) [EF]	SP	01/4/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ TCW Emerging Markets Income Class I (TGEIX) [MF]	SP	05/16/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Bond Index Short Term ETF (BSV) [EF]	SP	01/7/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Bond Index Total Bond Market ETF (BND) [EF]	SP	01/7/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Growth ETF (VUG) [EF]	SP	05/17/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard World FDS Consumer Staples ETF (VDC) [EF]	SP	01/7/2019	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#2 ⇒ Fidelity Magellan (FMAGX) [MF]	SP	05/24/2019	P	\$15,001 - \$50,000	
Seth: Fidelity Investments Roth IRA ⇒ AMG Yacktman Focused Fund (YAFFX) [MF]		05/16/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		05/16/2019	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		05/17/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		05/31/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		06/6/2019	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		06/10/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Global X FDS MLP & Energy Infrastructure ETF (MLPX)		01/7/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
[EF]					
Seth: Fidelity Investments Roth IRA ⇒ iShares TR MSCI UK ETF (EWU) [EF]		01/7/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ JP Morgan Exchange Traded FD BETBUILD (BBJP) [EF]		05/17/2019	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Roth IRA ⇒ Oakmark International Fund Investor Class (OAKIX) [MF]		05/16/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Oakmark Select Fund Institutional Class (OANLX) [MF]		06/6/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ PRIMECAP Odyssey Growth Fund (POGRX) [MF]		01/4/2019	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Roth IRA ⇒ PRIMECAP Odyssey Growth Fund (POGRX) [MF]		05/16/2019	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Roth IRA ⇒ Vanguard Growth ETF (VUG) [EF]		01/7/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Vanguard Growth ETF (VUG) [EF]		05/18/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Vanguard World FDS Consumer Staples ETF (VDC) [EF]		01/7/2019	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
Spencer Stuart	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Beverly Bank	May 2017	Personal residence mortgage	\$500,001 - \$1,000,000
JT	Academy Mortgage	November 2019	Personal residence mortgage	\$500,001 - \$1,000,000
SP	Chase Bank	December 2019	Credit card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Salem YMCA

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

- o Daughter's 529 (Owner: SP)
LOCATION: MA
- o Fidelity Investments Transfer of Death Account (Owner: JT)
LOCATION: US
DESCRIPTION: Assets previously disclosed under asset class name "Liz: Transfer on Death Account"
- o Liz: Fidelity Investments IRA#1 (Owner: SP)
DESCRIPTION: Assets previously disclosed under the asset class name "Liz: Eagle Fund IRA"
- o Liz: Fidelity Investments IRA#2 (Owner: SP)
DESCRIPTION: Assets previously disclosed under asset class name "Liz: Eagle Fund IRA"
- o Liz: Fidelity Investments Roth IRA (Owner: SP)
DESCRIPTION: Assets previously disclosed under asset class name "Liz: American Funds Roth IRA"
- o Liz: Variable Life Insurance (Owner: SP)
- o Niece's 529 Account
LOCATION: MA

- Seth: Fidelity Investments Rollover IRA
DESCRIPTION: Assets previously disclosed under asset class name "Seth: American Funds IRA"
- Seth: Fidelity Investments Roth IRA
DESCRIPTION: Assets previously disclosed under asset class name "Seth: Eagle Strategies Roth IRA"
- Thea's 529 (Owner: SP)
LOCATION: NY

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. Seth Moulton , 08/13/2020