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Financial Disclosure Report

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Filer Information

Name: Hon. Josh Harder
Status: Member
State/District: CA10

Filing Information

Filing Type: Amendment Report
Filing Year: 2019
Filing Date: 08/13/2021

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Bank of America Checking Account [BA]	JT	$50,001 - $100,000	Interest	$1 - $200	☐
Betterment Retirement Account ⇒ Developed Markets (SCHF) [EF]		$1,001 - $15,000	None		☐
Betterment Retirement Account ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		$1,001 - $15,000	None		☐
Betterment Retirement Account ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [ST]		$1,001 - $15,000	None		☐
Betterment Retirement Account ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [ST]		$1 - $1,000	None		☐
Betterment Retirement Account ⇒ iShares National Muni Bond ETF (MUB) [ST]		$1,001 - $15,000	None		☐
Betterment Retirement Account ⇒ Schwab U.S. Broad Market ETF (SCHB) [ST]		$15,001 - $50,000	Dividends	$201 - $1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Betterment Retirement Account ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [EF]		$1,001 - $15,000	None		
Betterment Retirement Account ⇒ SPDR Nuveen Bloomberg Barclays Municipal Bond ETF (TFI) [ST]		$1,001 - $15,000	None		
Betterment Retirement Account ⇒ US Large-Cap Value (VTV) [EF]		$1,001 - $15,000	None		
Betterment Retirement Account ⇒ US Mid-Cap Value (VOE) [EF]		$1,001 - $15,000	None		
Betterment Retirement Account ⇒ US Small-Cap Value (VBR) [EF]		$1,001 - $15,000	None		
Betterment Retirement Account ⇒ Vanguard Emerging Markets Government Bond ETF (VWOB) [ST]		$1,001 - $15,000	None		
Betterment Retirement Account ⇒ Vanguard FTSE Developed Markets ETF (VEA) [ST]		$15,001 - $50,000	Dividends	$201 - $1,000	
Betterment Retirement Account ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [ST]		$15,001 - $50,000	Dividends	$201 - $1,000	
Betterment Retirement Account ⇒ Vanguard Short-Term Inflation-Protected Securities Index Fund (VTIP) [ST]		$1 - $1,000	None		
Betterment Retirement Account ⇒ Vanguard Total International Bond ETF (BNDX) [ST]		$1,001 - $15,000	None		
Betterment Retirement Account ⇒ Vanguard Total Stock Market ETF (VTI) [ST]		$1,001 - $15,000	None		
Betterment Traditional IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]		$1 - $1,000	Tax-Deferred		
Betterment Traditional IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [ST]		$1 - $1,000	Tax-Deferred		
Betterment Traditional IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [ST]		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Betterment Traditional IRA ⇒ Schwab Emerging Markets Equity ETF (SCHE) [ST]		$1 - $1,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [ST]		$15,001 - $50,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [ST]		$1,001 - $15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Mid-Cap Value ETF (VOE) [ST]		$1,001 - $15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Short-Term Inflation-Protected Securities Index Fund (VTIP) [ST]		$1 - $1,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Small-Cap Value ETF (VBR) [ST]		$1,001 - $15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Total Bond Market ETF (BND) [ST]		$1,001 - $15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Total International Bond ETF (BNDX) [ST]		$1,001 - $15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Total Stock Market ETF (VTI) [ST]		$15,001 - $50,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Value ETF (VTV) [ST]		$1,001 - $15,000	Tax-Deferred		
BVA Fund IX [PS] Description: Bessemer Venture Associates IX L.P.		$50,001 - $100,000	Capital Gains	$5,001 - $15,000	
BVA Fund VIII [PS] Description: Bessemer Venture Associates VIII L.P.		$1,001 - $15,000	Capital Gains	None	
Charles Schwab Investment Account ⇒ Bank Sweep [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	
Charles Schwab Investment Account ⇒ LAUDUS INTERNATIONAL MAR [MF]	SP	$50,001 - $100,000	Capital Gains, Dividends	$1,001 - $2,500	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Charles Schwab Investment Account ⇒ SCHWAB US SMALL CAP ETF [EF]	SP	$100,001 - $250,000	Dividends	$1,001 - $2,500	☐
Charles Schwab Investment Account ⇒ SPDR LONG TERM CORPORATE BOND [EF]	SP	None	Capital Gains, Dividends	$1,001 - $2,500	☑
Charles Schwab Investment Account ⇒ SPDR S&P 500 ETF [EF]	SP	$500,001 - $1,000,000	Dividends, Interest	$15,001 - $50,000	☐
Charles Schwab Investment Account ⇒ SPDR S&P MIDCAP 400 ETF [EF]	SP	$250,001 - $500,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	☐
Charles Schwab Investment Account ⇒ WELLS FARGO INTERM TAX [MF]	SP	$50,001 - $100,000	Dividends	$1,001 - $2,500	☐
Charles Schwab IRA ⇒ Bank Sweep Activity [IH]	SP	$100,001 - $250,000	Tax-Deferred		☐
Charles Schwab IRA ⇒ SPDR S&P 500 ETF [EF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Charles Schwab IRA ⇒ SPDR S&P MIDCAP 400 ETF (MDY) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Fidelity Checking and Savings Account [BA]	SP	$1 - $1,000	Interest	$1 - $200	☐
Merrill Investment Account ⇒ Cash [BA]		$1,001 - $15,000	None		☐
Merrill Investment Account ⇒ Twilio Inc. Class A (TWLO) [ST]		$1,001 - $15,000	None		☐

* 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?
Charles Schwab Investment Account ⇒ SPDR LONG TERM CORPORATE BOND [EF]	SP	05/10/2019	S	$15,001 - $50,000	☑

* 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
Georgetown Social Enterprise Initiative	spouse salary	N/A
Capital Talent Partners	spouse salary	N/A
AllSource	spouse salary	N/A
Premier Talent Partners	spouse salary	N/A
Virginia Economic Development Partnership	spouse salary	N/A

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

None disclosed.

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

- Betterment Retirement Account
  Location: US
- Betterment Traditional IRA
- Charles Schwab Investment Account (Owner: SP)
  Location: US
- Charles Schwab IRA (Owner: SP)
- Merrill Investment Account
  Location: US

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
- [x] 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
- [x] 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
- [x] 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. Josh Harder , 08/13/2021