Filing ID #10035626

Financial Disclosure Report

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Filer Information

Name: Kristine Reeves
Status: Congressional Candidate
State/District: WA10

Filing Information

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 05/15/2020

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Deferred Compensation Plan ⇒ Retirement Strategy Fund [OT]		$15,001 - $50,000	Tax-Deferred		
Description: DCP is an IRC Section 457 plan administered by the Washington State Department of Retirement Systems (DRS). Investment type: Asset allocation funds Investment objectives: Seeks to achieve the highest total return over time consistent with its asset mix. Investment strategy: Diversified asset allocation portfolios designed for people who want to leave ongoing investment decisions to an experienced portfolio management team. The Retirement Strategy Fund is designed to correspond with the					
Department of Retirement Systems - PERS2 ⇒ PERS 2 [DB]		$50,001 - $100,000	Tax-Deferred		
Description: PERS Plan 2 are defined benefit plans that provide full pension benefits after the member reaches age 65. Comments: Most of Washington's public pension plans are designed to be prefunded, which means they accumulate the assets needed to pay a member's retirement benefits during the member's working years. The Judges' Retirement Fund and the Judicial Retirement System (both closed to new membership) are funded on a pay-as-you-go basis, which uses current receipts to pay current benefits. Both public employers and their employees contribute to the retirement plans. The amounts they contribute are calculated as					
Fidelity ⇒ Fidelity Series Bond Index Fund [CS]	SP	$1,001 - $15,000	None		
Description: Fidelity Freedom Index 2050 Fund					
Fidelity ⇒ Fidelity Series Global ex U.S. Index Fund [OT]	SP	$1,001 - $15,000	None		
Description: Fidelity Freedom Index 2050 Fund					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity ⇒ Fidelity Series Long-Term Treasury Bond Index Fund [CS]	SP	$1 - $1,000	None		
DESCRIPTION: Fidelity Freedom Index 2050 Fund					
Fidelity ⇒ Fidelity Series Total Market Index Fund [PS]	SP	$1,001 - $15,000	None		
DESCRIPTION: Fidelity Freedom Index 2050 Fund					
STRUO Strategies LLC, 100% Interest [OL]		$1,001 - $15,000	Contract	None	None
LOCATION: Federal Way / King, WA, US DESCRIPTION: Started strategic planning, project management, and graphic facilitation company in April 2019, with intended launch date of April 2020. Launch has been pushed back to January 2021, pending electoral outcome.					
Thrift Savings Plan ⇒ Defined Contribution Plan [OT]		$1 - $1,000	Tax-Deferred		
DESCRIPTION: The Thrift Savings Plan (TSP) is a retirement savings and investment plan for Federal employees and members of the uniformed services, including the Ready Reserve. It was established by Congress in the Federal Employees' Retirement System Act of 1986 and offers the same types of savings and tax benefits that many private corporations offer their employees under 401(k) plans. The TSP is a defined contribution plan, meaning that the retirement income you receive from your TSP account will depen COMMENTS: The Federal Retirement Thrift Investment Board (FRTIB or "Board") Administers the TSP The assets of the TSP are held in trust in the Thrift Savings Fund. The financial statements of the Thrift Savings Fund are required by law to be audited annually. The FRTIB is an independent Government agency that is managed by five presidentially appointed board members and an Executive Director who are required by law to manage the TSP prudently and solely in the interest of the participants and their bene					
TIAA ⇒ Equities - TIAA [OT]		$1,001 - $15,000	None		
DESCRIPTION: State Board Voluntary Investment Program Gonzaga University 403B Retirement Plan					
TIAA ⇒ Fixed Income - TIAA [FN]		$1 - $1,000	None		
DESCRIPTION: TIAA Traditional Annuity - Group Supplemental Retirement Annuity Guaranteed 4 This annuity offers you the option to convert a portion of your balance into lifetime income when you retire. TIAA Fixed Annuity 3.00% 3.00% 3.12% 3.13% 3.20% 3.28% -- 3/31/2020 TIAA Traditional Annuity - Retirement Annuity Guaranteed 4 This annuity offers you the option to convert a portion of your balance into lifetime income when you retire. TIAA Fixed Annuity 3.00% 3.00% 3.74%					
TIAA ⇒ Guaranteed - TIAA [OT]		$1 - $1,000	None		
DESCRIPTION: State Board Voluntary Investment Program #101307 Gonzaga University 403B Retirement Plan #101766					
TIAA ⇒ Real Estate - TIAA [RE]		$1 - $1,000	None		
USAA - Daughter's College Savings ⇒ Daughter's College Savings Plan [5P]	DC	$1,001 - $15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year

LOCATION: WA
COMMENTS: Due to COVID-19 and account migration/transition access issues from USAA to Victory Capital, asset breakdowns were not available at the time of filing. Updates to this account will be modified once access becomes available.

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
USAA - Son's College Savings ⇒ Son's College Savings Plan [5P]	DC	$1,001 - $15,000	None		

LOCATION: WA
COMMENTS: Due to COVID-19 and account migration/transition access issues from USAA to Victory Capital, asset breakdowns were not available at the time of filing. Updates to this account will be modified once access becomes available.

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
USAA Checking [BA]		$1 - $1,000	Interest	None	None
USAA Savings [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
USAA Savings - Daughter [BA]		$1 - $1,000	Interest	None	None
USAA Savings - House Account [BA]	JT	$1 - $1,000	Interest	$1 - $200	$1 - $200
USAA Savings - Son [BA]		$1 - $1,000	Interest	None	None
Vanguard ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares [PS]	SP	$15,001 - $50,000	None		

DESCRIPTION: Part of Fund of funds (Target Retirement 2050 Trust) that can be appropriate if you're planning to retire between 2048 and 2052. Includes global stocks, plus U.S. Treasury and high-quality corporate bonds. Currently invests almost entirely in stocks, giving your savings a high potential for growth. Begins annually reducing stocks and increasing bonds around 2026.

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard ⇒ Vanguard Total Bond Market II Index Fund Institutional Shares [CS]	SP	$1,001 - $15,000	None		

DESCRIPTION: Part of Fund of funds (Target Retirement 2050 Trust) that can be appropriate if you're planning to retire between 2048 and 2052. Includes global stocks, plus U.S. Treasury and high-quality corporate bonds. Currently invests almost entirely in stocks, giving your savings a high potential for growth. Begins annually reducing stocks and increasing bonds around 2026.

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard ⇒ Vanguard Total International Bond Index Fund Institutional Shares [CS]	SP	$1,001 - $15,000	None		

DESCRIPTION: Part of Fund of funds (Target Retirement 2050 Trust) that can be appropriate if you're planning to retire between 2048 and 2052. Includes global stocks, plus U.S. Treasury and high-quality corporate bonds. Currently invests almost entirely in stocks, giving your savings a high potential for growth. Begins annually reducing stocks and increasing bonds around 2026.

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard ⇒ Vanguard Total International Stock Index Fund Institutional Plus Shares [PS]	SP	$15,001 - $50,000	None		

DESCRIPTION: Part of Fund of funds (Target Retirement 2050 Trust) that can be appropriate if you're planning to retire between 2048 and 2052.

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Includes global stocks, plus U.S. Treasury and high-quality corporate bonds. Currently invests almost entirely in stocks, giving your savings a high potential for growth. Begins annually reducing stocks and increasing bonds around 2026.					
Washington State Employees Credit Union - CD [BA]	SP	$1 - $1,000	Interest	$1 - $200	$1 - $200
Washington State Employees Credit Union - Checking [BA]		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Washington State Employees Credit Union - Checking [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Washington State Employees Credit Union - Savings [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Washington State Employees Credit Union - Savings [BA]		$1 - $1,000	Interest	None	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 C: Earned Income

Source	Type	Amount Current Year to Filing	Amount Preceding Year
State of WA House of Representatives	Salary	$.00	$59,553.79
Comments: I resigned from the legislature in December of 2019. I filed for Congress in January of 2020. I received no income from the legislature in 2020.			
WA Department of Commerce	Salary	$28,250.00	$82,088.08
Comments: I went to a part-time status at the Department in January of 2020. My employment with the Department ends on May 31 of 2020. My current yearly amount is calculated based off earning statements from January - May 2020. Current Year Amount estimated at 5,650 per month x 5 months.			
Horizon Air Industries Inc	Spouse Salary	$.00	$33,191.01
Alaska Airlines Inc	Spouse Salary	$43,290.91	$54,689.64
Comments: Current Year Amount = January - May 2020, wages, tips and other compensation.			

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	USAA c/o Nationstar Mortgage LLC	May 2014	Home	$100,001 - $250,000
	COMMENTS: $233,552.93 per 2019 Form 1096			
	Seattle Credit Union	August 2016	Vehicle	$15,001 - $50,000
	U.S. Department of Education	1999-2004 and 2006-2007	Undergraduate and graduate student loans	$100,001 - $250,000
	COMMENTS: Consolidated student loan debt into one account.			

SCHEDULE E: POSITIONS

Position	Name of Organization
State Representative COMMENTS: 2017-2019	Washington State House of Representatives
Director, Economic Development COMMENTS: 2013-2020	State of Washington, Department of Commerce
Member	Pacific Northwest Organizational Development Network
Registered Organizational Development Consultant	International Society for Organizational Development & Change
Member	International Forum of Visual Practitioners
Professional Member	Global Institute of Organizational Development Network
Member	Puget Sound Project Management Institute
Member COMMENTS: License # 2269325	Project Management Institute
Advisory Board Member	Pacific Northwest Defense Coalition
Member	Association of Professional Genealogists
Member	International Association of Master Penmen, Engrossers & Teachers of Handwriting
Member	Truman National Security Project
Member, State Advisors Council	Association of Defense Communities
Member	Zeta Phi Beta Sorority, Inc.

SCHEDULE F: AGREEMENTS

None disclosed.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

None disclosed.

Schedule A Asset Class Details

- Deferred Compensation Plan
  Description: State Employee Retirement Account; GWFS Equities, Inc.
  Comments: From 6.5 years of service as state employee with Washington State Department of Commerce.
- Department of Retirement Systems - PERS2
  Description: State Employee Retirement Account
  Comments: From 12 years of service in state employment between Washington State University, Community & Technical Colleges of Spokane and Department of Commerce.
- Fidelity (Owner: SP)
  Description: Retirement Account
- Thrift Savings Plan
  Description: Federal Employee Retirement Account The Thrift Savings Plan (TSP) is a retirement savings and investment plan for Federal employees and members of the uniformed services, including the Ready Reserve. It was established by Congress in the Federal Employees' Retirement System Act of 1986 and offers the same types of savings and tax benefits that many private corporations offer their employees under 401(k) plans. The TSP is a defined contribution plan, meaning that the retirement income you receive from your TSP account will depend on how much you (and your agency, if you are eligible to receive agency contributions) put into your account during your working years and the earnings accumulated over that time.
  Comments: From 5 years of service with Senator Patty Murray.
- TIAA
  Description: Community College Employee Retirement Account
- USAA - Daughter's College Savings (Owner: DC)
  Location: WA
- USAA - Son's College Savings (Owner: DC)
  Location: WA
- Vanguard (Owner: SP)
  Description: Retirement Account

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

Comments

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: Kristine Reeves , 05/15/2020