



Filing ID #10035837

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Christine Bubser
Status: Congressional Candidate
State/District: CA08

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 08/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Amplify.LA Capital II, L.L.C. [HE]	JT	\$50,001 - \$100,000	Partnership Income	\$1,001 - \$2,500	None
Amplify.LA Capital IV, LP [HE]	JT	\$15,001 - \$50,000	None		
Hulu, LLC - 401(k) Plan ⇒ AF Target Date 2030 R6 (RFETX) [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
JPMorgan Chase Bank, N.A. [BA]	DC	\$1,001 - \$15,000	None		
JPMorgan Chase Bank, N.A. [BA]	DC	\$1,001 - \$15,000	None		
JPMorgan Chase Bank, N.A. [BA] DESCRIPTION: Checking & Savings	JT	\$1,001 - \$15,000	None		
TIAA - ScholarShare 529 College Savings Plan # 2 ⇒ Enrollment Year Portfolio Passive [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		
TIAA - ScholarShare 529 College Savings Plan # 3 ⇒ 2020/2021 Enrollment Portfolio Passive [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo - Bubser Baron Family Trust # 1 ⇒ Apple Inc. (AAPL) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Wells Fargo - Bubser Baron Family Trust # 1 ⇒ Blackrock Science & Technology TR II Shs Ben Int (BSTZ) [MF]	JT	None	Capital Gains	\$201 - \$1,000	None
Wells Fargo - Bubser Baron Family Trust # 1 ⇒ Pimco Energy & Tactical Credit Opportunities Fund (NRGX) [MF]	JT	None	Dividends	None	\$201 - \$1,000
DESCRIPTION: Sold for a loss					
Wells Fargo - Bubser Baron Family Trust # 1 ⇒ Wells Fargo Cash [BA]	JT	\$100,001 - \$250,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Allianzgi NFJ Dividend Int & Prem Strategy Fund (NFJ) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ AngloGold Ashanti Limited (AU) [ST]	JT	\$1,001 - \$15,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Barrick Gold Corporation Common Stock (GOLD) [ST]	JT	\$1,001 - \$15,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Blackrock Muni Yield California Quality Fund (MCA) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Eaton Vance Tax-Managed Buy-Write Opportunities Fund (ETV) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Eaton Vance Tax-Managed Global Buy-Write Opportunities Fund (ETW) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Global X MLP & Energy Infrastructure (MLPX) [EF]	JT	None	Dividends	\$201 - \$1,000	None
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Invesco Calf Value Mun Income Trust (VCV) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Invesco Optimum Yield (PDBC) [EF]	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ IVA Worldwide Fund Class I (IVWIX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	None
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ JPMorgan Opportunistic Equity Long/Short (JOEQX) [MF]	JT	\$1,001 - \$15,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Neuberger Berman Long/Short Fund Instl (NLSIX) [MF]	JT	\$1,001 - \$15,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Nuveen Core Equity Alpha Fund (JCE) [EF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Snap Inc. Class A (SNAP) [ST]	JT	\$1,001 - \$15,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ SPDR Gold Trust (GLD) [EF]	JT	\$1,001 - \$15,000	None		
Wells Fargo - Bubser Baron Family Trust # 2 ⇒ Wells Fargo Cash [BA]	JT	\$15,001 - \$50,000	None		
Wells Fargo - Roth IRA ⇒ American Funds New World Fund CL F2 (NFFFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Blackrock Science & Technology (BST) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Goldman Sachs Intl Opportunities Fund Instl CL (GSIMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Invesco Optimum Yield Diversified Commodity (PDBC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ iShares Gold Trust (IAU) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ JHF Seaport Long/Short Fund Class I (JSFDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo - Roth IRA ⇒ JPMorgan TR I Opportunistic Equity Long/Short FD I CL (JOEQX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Legg Mason Funds Clearbridge Intl Growth Class I (LMGNX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Netflix, Inc. (NFLX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Neuberger Berman Long Short Fund Instl Cl (NLSIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Nuveen Nasdaq 100 Dynamic Overwrite Fund (QQQX) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Nuveen S&P 500 Dynamic Overwrite Fund (SPXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ PIMCO Funds Income FD Instl CL (PIMIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Vanguard Chester Funds Target Retirement 2030 (VTHR) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo - Roth IRA ⇒ Wells Fargo Standard Bank Deposit [BA]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo IRA ⇒ Baird Funds Inc MidCap Fund Instl (BMDIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ Chartwell Funds Small Cap Value Fund (CWSIX) [MF]	SP	None	Tax-Deferred		
DESCRIPTION: SOLD					
Wells Fargo IRA ⇒ FMI Large Cap Fund Institutional Class (FMIQX) [MF]	SP	None	Tax-Deferred		
DESCRIPTION: SOLD					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo IRA ⇒ Gabelli Equity Ser Fund Small Cap Growth Fund Class I (GACIX) [MF] DESCRIPTION: SOLD	SP	None	Tax-Deferred		
Wells Fargo IRA ⇒ Hermes Treasury Obligations Fund CL IS (TDIXX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo IRA ⇒ Invesco Oppenheimer International Growth Fund CL Y (OIGYX) [MF] DESCRIPTION: SOLD	SP	None	Tax-Deferred		
Wells Fargo IRA ⇒ Invesco Optimum Yield (PDBC) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ Investment Managers Ser 361 Global Long/Short Equity Fund CL I (AGAZX) [MF] DESCRIPTION: SOLD	SP	None	Tax-Deferred		
Wells Fargo IRA ⇒ iShares 7-10 Yr Treasury Bond ETF (IEF) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF] DESCRIPTION: SOLD	SP	None	Tax-Deferred		
Wells Fargo IRA ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo IRA ⇒ iShares Gold Trust (IAU) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ iShares Inc. Core MSCI Emerging Markets (IEMG) [EF] DESCRIPTION: SOLD	SP	None	Tax-Deferred		
Wells Fargo IRA ⇒ iShares JP Morgan USD Emerging Markets Bond (EMB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ Ishares Russell Mid-Cap ETF (IWR) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo IRA ⇒ JHF Seaport Long/Short Fund Class I (JSFOX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ John Hancock Funds II Global Absolute Return Strategies Fund CL I (JHAIX) [MF]	SP	None	Tax-Deferred		
Wells Fargo IRA ⇒ John Hancock Funds III Disciplined Value MidCap Fund CL I (JVMIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ JPMorgan TR I Opportunistic Equity Long/Short FDI CL (JOEQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ Neuberger Berman Alternatives FDS Long Short Fund Instl CL (NLSIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ Pear Tree Funds Foreign Value Fund Instl (QFVIX) [MF]	SP	None	Tax-Deferred		
DESCRIPTION: SOLD					
Wells Fargo IRA ⇒ Pimco Dynamic Credit and Mortgage Income Fund (PCI) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo IRA ⇒ PIMCO Funds Income FD Instl CL (PIMIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo IRA ⇒ SPDR S&P 500 ETF TR Unit Ser 1 (SPY) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo IRA ⇒ Vanguard Total World Stock Index Fund (VT) [EF]	SP	None	Tax-Deferred		
Wells Fargo IRA ⇒ Wells Fargo Standard Bank Deposit [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ American Funds New World Fund CL F2 (NFFFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Baird Funds Inc MidCap FD Instl CL (BMDIX) [MF]					
Wells Fargo Sep IRA ⇒ Blackrock Science & Technology (BST) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Chartwell Funds Small Cap Value Fund (CWSIX) [MF]		None	Tax-Deferred		
Wells Fargo Sep IRA ⇒ FMI Large Cap Fund Instl Class (FMIQX) [MF]		None	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Gabelli Equity Ser Fund Small Cap Growth Fund Class I (GACIX) [MF]		None	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Goldman Sachs Intl Opportunities Fund Instl CL (GSIMX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Invesco Oppenheimer International Growth Fund CL Y (OIGYX) [MF]		None	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Invesco Optimum Yield Diversified Commodity (PDBC) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Investment Managers SER 361 Global Long/Short Equity Fund CL I (AGAZX) [MF]		None	Tax-Deferred		
Wells Fargo Sep IRA ⇒ iShares 7-10 Yr Treasury Bond ETF (IEF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		None	Tax-Deferred		
Wells Fargo Sep IRA ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ iShares Gold Trust (IAU) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares Inc Core MSCI Emerging Markets (IEMG) [EF]					
Wells Fargo Sep IRA ⇒ iShares JP Morgan USD Emerging Markets Bond (EMB) [EF]		None	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Ishares Russell Mid-Cap ETF (IWR) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ JHF Seaport Long/Short Fund Class I (JSFDX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ John Hancock Funds II Global Absolute Return Strategies FD CL I (JHAIX) [MF]		None	Tax-Deferred		
Wells Fargo Sep IRA ⇒ John Hancock Funds III Disciplined Value MidCap Fund CL I (JVMIX) [MF]		None	Tax-Deferred		
Wells Fargo Sep IRA ⇒ JPMorgan TR I Opportunistic Equity Long/Short FD I CL (JOEQX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Legg Mason Funds Clearbridge Intl Growth Class I (LMGNX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Locorr Invt Trust Macro Strategies Fund Class I (LFMIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Neuberger Berman Long Short Fund Instl Cl (NLSIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Nuveen Nasdaq 100 Dynamic Overwrite Fund (QQQX) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Nuveen S&P 500 Dynamic Overwrite Fund (SPXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Pear Tree Funds Foreign Value Fund Instl (QFVIX) [MF]					
Wells Fargo Sep IRA ⇒ Pimco Total Return Esg Fund Class Instl (PTSAX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ SPDR S&P 500 ETF TR Unit Ser 1 (SPY) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ TIAA-CREF Core Impact Bond Fund Instl Class (TSBIX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Vanguard Total World Stock Index Fund (VT) [EF]		None	Tax-Deferred		
Wells Fargo Sep IRA ⇒ Wells Fargo Standard Bank Deposit [IH]		\$100,001 - \$250,000	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 C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Hulu	Spouse Salary	N/A	N/A
University of Southern California	Spouse Salary	N/A	N/A
Coleman Research	Spouse Consulting	N/A	N/A
Third Bridge, Inc.	Spouse Consulting	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Chase	July 2020	Credit card	\$10,000 - \$15,000
JT	Wells Fargo	May 2018	Priority Credit Line - Securities Backed Line of Credit	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Hulu, LLC - 401(k) Plan (Owner: SP)
- TIAA - ScholarShare 529 College Savings Plan # 2 (Owner: DC)
LOCATION: CA
- TIAA - ScholarShare 529 College Savings Plan # 3 (Owner: DC)
LOCATION: CA
- Wells Fargo - Bubser Baron Family Trust # 1 (Owner: JT)
LOCATION: US
- Wells Fargo - Bubser Baron Family Trust # 2 (Owner: JT)
LOCATION: US
- Wells Fargo - Roth IRA
- Wells Fargo IRA (Owner: SP)
- Wells Fargo Sep IRA

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: Christine Bubser , 08/13/2020