



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Darrell E. Issa  
**Status:** Member  
**State/District:** CA50

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2020  
**Filing Date:** 07/16/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
1200 Harbor Dr, LP 100% interest [RP]  LOCATION: Oceanside, CA, US DESCRIPTION: Holds property located at 1200 Harbor Dr. Unit 12C	JT	\$500,001 - \$1,000,000	None		
12400 Stowe Dr, LP, 100% interest [RP]  LOCATION: Poway, CA, US DESCRIPTION: Held property located at 12400 Stowe Dr. This property was sold on 12/31/20,	JT	None	Capital Gains, Rent	Not Applicable	Over \$5,000,000
1800 Carillon Blvd, LP, 100% interest [RP]  LOCATION: Cincinnati, OH, US DESCRIPTION: Holds property located at 1800 Carillon Blvd	JT	\$1,000,001 - \$5,000,000	Rent	Not Applicable	\$100,001 - \$1,000,000
212 Main St LP, 100% interest [RP]  LOCATION: Fallbrook, CA, US DESCRIPTION: Holds Property located at 212 Main St	JT	\$1,000,001 - \$5,000,000	Rent	Not Applicable	\$100,001 - \$1,000,000
2585 Business Park LP, 100% interest [RP]	JT	\$1,000,001 - \$5,000,000	Rent	Not Applicable	\$100,001 - \$1,000,000

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
LOCATION: Vista, CA, US DESCRIPTION: Holds property located at 2585 Business Park					
3186 Vista Way, LP, 100% interest [RP]	JT	\$1,000,001 - \$5,000,000	Capital Gains, Interest, Rent	Not Applicable	\$100,001 - \$1,000,000
LOCATION: Vista, CA, US DESCRIPTION: This entity previously held property located at 3186 Vista Way. The property was spold on 10/27/20 but the seller (3186 Vista Way, LP) is financing the sale and holds a mortgage for \$3.2 million.					
5931 Priestly Dr LP, 100% interest [RP]	JT	\$5,000,001 - \$25,000,000	Rent	Not Applicable	\$100,001 - \$1,000,000
LOCATION: Carlsbad, CA, US DESCRIPTION: Holds property located at 5931 Priestly Dr					
Account 1 ⇒ AllianzGI Short Duration High Income Fund Class P ASHPX [MF]	JT	None	Dividends	Not Applicable	\$1,000,001 - \$5,000,000
Account 1 ⇒ Baron Growth Fund Institutional Class BGRIX [MF]	JT	None	Capital Gains	Not Applicable	Over \$5,000,000
Account 1 ⇒ Invesco QQQ Trust [MF]	JT	None	Capital Gains, Dividends	Not Applicable	\$1,000,001 - \$5,000,000
Account 1 ⇒ iShares Russell 1000 Value ETF Symbol IWD [MF]	JT	None	Dividends	Not Applicable	\$100,001 - \$1,000,000
Account 1 ⇒ iShares Russell 2000 ETF symbol IWM [MF]	JT	Over \$50,000,000	Capital Gains, Dividends	Not Applicable	Over \$5,000,000
Account 1 ⇒ Principal Investors High Yield PHYTX [MF]	JT	None	Capital Gains, Dividends	Not Applicable	\$100,001 - \$1,000,000
Account 1 ⇒ SPDR Bloomberg Barclays High Yield Bond JNK [MF]	JT	None	Dividends	Not Applicable	\$100,001 - \$1,000,000
Account 1 ⇒ SPDR Dow Jones Indl Average DIA [MF]	JT	Over \$50,000,000	Capital Gains, Dividends	Not Applicable	\$1,000,001 - \$5,000,000
Account 1 ⇒ SPDR S & P 500 SPY [MF]	JT	None	Dividends	Not Applicable	\$100,001 - \$1,000,000
Account 1 ⇒	JT	Over	Interest	Not Applicable	\$15,001 -

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
UBS Bank USA Deposit Account [BA]		\$50,000,000			\$50,000
Account 1 ⇒ UBS Bank USA MMF [BA]	JT	None	Interest	Not Applicable	\$50,001 - \$100,000
Account 2 ⇒ UBS Bank USA Deposit Account [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	Not Applicable
Congressional Federal credit Union Account [BA]	JT	\$50,001 - \$100,000	Interest	Not Applicable	\$1 - \$200
DEI Investments, LLC, 100% Interest [OT]	JT	None	None		
DESCRIPTION: Entity formed in 2009 to perform investment management but was never utilized or funded. The entity was also never dissolved so it exists with no assets and no income.					
DEI, LLC, 100% interest [OT]	JT	\$100,001 - \$250,000	Partnership Income	Not Applicable	\$50,001 - \$100,000
DESCRIPTION: DEI, LLC is the general partner owning 1% of each of the Limited Partnerships listed.					
Greene Insurance Company, 100% interest, 100% Interest [OT]	JT	None	Dividends, insurance premiums	Not Applicable	\$100,001 - \$1,000,000
DESCRIPTION: Greene Insurance Company was a captive insurance company, a Series member of Dresden Insurance Company LLC. It was dissolved effective July 2020..					
Greene Properties, Inc, 100% interest [OT]	JT	\$100,001 - \$250,000	None		
DESCRIPTION: Greene Properties is a property management company which manages the various properties held by the LP's listed.					
Ocean Collection LP, 100% interest [RP]	JT	\$5,000,001 - \$25,000,000	Rent	Not Applicable	\$100,001 - \$1,000,000
LOCATION: Carlsbad, CA, US DESCRIPTION: Holds property located at 2510, 2520, 2540, 2542, 2544, 2546, 2550, 2552, 2554 and 2556 Gateway Road.					
Tahoe Beach LP, 100% interest [RP]	JT	\$1,000,001 - \$5,000,000	None		
LOCATION: Lake Tahoe, CA, US DESCRIPTION: Holds property located at 314 Beach Dr.					

\* 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
Greene Properties	spouse salary	N/A	\$28,162.00

#### **SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	UBS Margin Account	09/11/14	This is a margin account tied to the Account 1 investment account	Over \$50,000,000

#### **SCHEDULE E: POSITIONS**

Position	Name of Organization
Director	Greene Properties
Member	DEI, LLC
Limited Partner	212 S Main Street LP
Limited Partner	5931 Priestly LP
Limited Partner	3186 Vista Way LP
Limited Partner	1800 Carillon Blvd LP
Limited Partner	12400 Stowe Dr LP
Limited Partner	Ocean Collection LP
Limited Partner	1200 Harbor Dr LP
Limited Partner	Tahoe Beach LP
Limited Partner	2585 Business Park LP
Limited Partner	25 D St LP
President	Greene Insurance
President	Issa Family Foundation
Member	DEI Investments LLC

#### **SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Account 1 (Owner: JT)  
LOCATION: CA, US
- Account 2 (Owner: JT)  
LOCATION: US

## 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:** Hon. Darrell E. Issa , 07/16/2021