



# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Suzanne Bonamici  
**Status:** Member  
**State/District:** OR01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 07/7/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise Cash Holding [OT]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Class: Miscellaneous Assets Jointly Owned (Location: U.S.)					
Concord Theatricals [OT]	SP	\$15,001 - \$50,000	Royalties	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: fka as Samuel French, Inc. and Tams-Witmark Music Library, Inc (Royalties from "Odd Couple")					
Franklin Growth Alloc. [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
GEP Talent Services, LLC [OT]	SP	\$1,001 - \$15,000	Royalties	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: miscellaneous television rerun royalties					
Gold coins [OT]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: Class: Miscellaneous Assets Jointly Owned (Location: U.S.)					
Goldman Sachs GQG Int'l. Opptys [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
International Authors Society [OT]	SP	\$15,001 - \$50,000	Royalties	\$5,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Royalties from "Odd Couple"					
ISHARES CORE S&P Mid-Cap [EF]	JT	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
ISHARES MSCI EAFE Value [EF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
JPMorgan Large Cap Growth [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
JPMorgan Tax Aware Equity [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Loomis Sayles Growth [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Mainstay Mackay Tax Free Bond [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
MFS Intl. Value [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
MFS Muni. High Inc. [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
MFS Value [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Multi Mgr. Small Cap Equity Strat. [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Multi Mgr. Total Return Bond Strat. [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Multi Mgr. Value Strat [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Northwestern Mutual Life Ins. Co. [OT]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: life ins. cash value					
Nuveen Inter. Dur. Muni. Bond [MF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Nuveen Ltd. Term Muni. Bond [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
OnPoint Community Credit Union [OT]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: checking and savings accounts					
U.S. Bank NA [BA]	JT	\$500,001 - \$1,000,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: checking and savings accounts					
U.S. Bank, NA [BA]		None	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
Vanguard 500 Index Mut. Fund [MF]	SP	\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Federal Money Mkt. Fund [OT]	SP	\$1,000,001 - \$5,000,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Class: The Michael H. Simon Rollover IRA at Vanguard (Location: U.S.)					
Vanguard Inter. Term Corp. Bond [MF]	SP	None	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Mid-Cap ETF [EF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard PRIMECAP Mut. Fund [MF]	SP	\$500,001 - \$1,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Wells Fargo Emerg. Mkts. Equity [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Wells Fargo Short Term Muni. Bond [MF]	JT	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Western Asset Interm. Term Muni. [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>

\* 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?
Goldman Sachs GQG Int'l. Oppty [MF]	JT	02/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Goldman Sachs GQG Int'l. Oppty [MF]	JT	03/6/2020	S (partial)	\$791.00	<input type="checkbox"/>
Goldman Sachs GQG Int'l. Oppty [MF]	JT	03/25/2020	P	\$685.00	
Goldman Sachs GQG Int'l. Oppty [MF]	JT	05/15/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Goldman Sachs GQG Int'l. Oppty [MF]	JT	08/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
ISHARES CORE S&P Mid-Cap [EF]	JT	02/14/2020	P	\$15,001 - \$50,000	
ISHARES CORE S&P Mid-Cap [EF]	JT	03/6/2020	P	\$1,001 - \$15,000	
ISHARES CORE S&P Mid-Cap [EF]	JT	03/25/2020	P	\$1,001 - \$15,000	
ISHARES CORE S&P Mid-Cap [EF]	JT	05/15/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
ISHARES MSCI EAFE Value [EF]	JT	02/14/2020	P	\$1,001 - \$15,000	
ISHARES MSCI EAFE Value [EF]	JT	03/6/2020	P	\$1,001 - \$15,000	
ISHARES MSCI EAFE Value [EF]	JT	03/25/2020	P	\$1,001 - \$15,000	
ISHARES MSCI EAFE Value [EF]	JT	05/15/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
ISHARES MSCI EAFE Value [EF]	JT	08/14/2020	P	\$15,001 - \$50,000	
JPMorgan Large Cap Growth [MF]	JT	02/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JPMorgan Large Cap Growth [MF]	JT	03/6/2020	P	\$1,001 - \$15,000	
JPMorgan Large Cap Growth [MF]	JT	03/25/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPMorgan Large Cap Growth [MF]	JT	05/15/2020	P	\$15,001 - \$50,000	
JPMorgan Large Cap Growth [MF]	JT	08/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JPMorgan Tax Aware Equity [MF]	JT	02/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JPMorgan Tax Aware Equity [MF]	JT	03/6/2020	P	\$1,001 - \$15,000	
JPMorgan Tax Aware Equity [MF]	JT	03/25/2020	P	\$1,001 - \$15,000	
JPMorgan Tax Aware Equity [MF]	JT	05/15/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JPMorgan Tax Aware Equity [MF]	JT	08/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Loomis Sayles Growth [MF]	JT	02/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Loomis Sayles Growth [MF]	JT	03/6/2020	P	\$1,001 - \$15,000	
Loomis Sayles Growth [MF]	JT	03/25/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Loomis Sayles Growth [MF]	JT	05/15/2020	P	\$15,001 - \$50,000	
Loomis Sayles Growth [MF]	JT	08/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Mainstay Mackay Tax Free Bond [MF]	JT	08/14/2020	P	\$50,001 - \$100,000	
MFS Intl . Value [MF]	JT	02/14/2020	S (partial)	\$1,000.00	<input type="checkbox"/>
MFS Intl . Value [MF]	JT	03/6/2020	P	\$750.00	
MFS Intl . Value [MF]	JT	03/25/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
MFS Intl . Value [MF]	JT	08/14/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
MFS Muni. High Inc. [MF]	JT	02/14/2020	P	\$1,001 - \$15,000	
MFS Muni. High Inc. [MF]	JT	03/6/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
MFS Muni. High Inc. [MF]	JT	03/25/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
MFS Muni. High Inc. [MF]	JT	05/15/2020	P	\$1,001 - \$15,000	
MFS Muni. High Inc. [MF]	JT	08/14/2020	P	\$1,001 - \$15,000	
MFS Value [MF]	JT	02/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
MFS Value [MF]	JT	03/6/2020	P	\$1,001 - \$15,000	
MFS Value [MF]	JT	03/25/2020	P	\$1,001 - \$15,000	
MFS Value [MF]	JT	05/15/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
MFS Value [MF]	JT	08/14/2020	P	\$133.00	
Multi Mgr. Small Cap Equity Strat. [MF]	JT	02/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Multi Mgr. Small Cap Equity Strat. [MF]	JT	03/6/2020	P	\$1,001 - \$15,000	
Multi Mgr. Small Cap Equity Strat. [MF]	JT	03/25/2020	P	\$1,001 - \$15,000	
Multi Mgr. Small Cap Equity Strat. [MF]	JT	05/15/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Multi Mgr. Small Cap Equity Strat. [MF]	JT	08/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Multi Mgr. Total Return Bond Strat. [MF]	JT	02/14/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Multi Mgr. Total Return Bond Strat. [MF]	JT	03/6/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Multi Mgr. Total Return Bond Strat. [MF]	JT	03/25/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Multi Mgr. Total Return Bond Strat. [MF]	JT	05/15/2020	P	\$1,001 - \$15,000	
Multi Mgr. Total Return Bond Strat. [MF]	JT	08/14/2020	P	\$1,001 - \$15,000	
Multi Mgr. Value Strat [MF]	JT	02/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Multi Mgr. Value Strat [MF]	JT	03/6/2020	P	\$1,001 - \$15,000	
Multi Mgr. Value Strat [MF]	JT	03/25/2020	P	\$1,001 - \$15,000	
Multi Mgr. Value Strat [MF]	JT	05/15/2020	P	\$1,001 - \$15,000	
Multi Mgr. Value Strat [MF]	JT	08/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Nuveen Inter. Dur. Muni. Bond [MF]	JT	02/14/2020	P	\$15,001 - \$50,000	
Nuveen Inter. Dur. Muni. Bond [MF]	JT	03/6/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Nuveen Inter. Dur. Muni. Bond [MF]	JT	03/25/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Nuveen Inter. Dur. Muni. Bond [MF]	JT	05/15/2020	P	\$1,001 - \$15,000	
Nuveen Inter. Dur. Muni. Bond [MF]	JT	08/14/2020	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Nuveen Ltd. Term Muni. Bond [MF]	JT	08/14/2020	P	\$100,001 - \$250,000	
Vanguard 500 Index Mut. Fund [MF]	SP	01/2/2020	P	\$100,001 - \$250,000	
DESCRIPTION: Class: The Michael H. Simon Rollover IRA at Vanguard (Location: U.S.)					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard 500 Index Mut. Fund [MF]	SP	03/17/2020	P	\$500,001 - \$1,000,000	
DESCRIPTION: Class: The Michael H. Simon Rollover IRA at Vanguard (Location: U.S.)					
Vanguard 500 Index Mut. Fund [MF]	SP	03/18/2020	P	\$250,001 - \$500,000	
DESCRIPTION: Class: The Michael H. Simon Rollover IRA at Vanguard (Location: U.S.)					
Vanguard 500 Index Mut. Fund [MF]	SP	03/23/2020	P	\$250,001 - \$500,000	
DESCRIPTION: Class: The Michael H. Simon Rollover IRA at Vanguard (Location: U.S.)					
Vanguard 500 Index Mut. Fund [MF]	SP	06/15/2020	S (partial)	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
Vanguard Federal Money Mkt. Fund [MF]	SP	06/15/2020	P	\$1,000,001 - \$5,000,000	
DESCRIPTION: Class: The Michael H. Simon Rollover IRA at Vanguard (Location: U.S.)					
Vanguard Inter. Term Corp. Bond [MF]	SP	01/2/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
DESCRIPTION: Class: The Michael H. Simon Rollover IRA at Vanguard (Location: U.S.)					
Vanguard Inter. Term Corp. Bond [MF]	SP	03/17/2020	S (partial)	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: Class: The Michael H. Simon Rollover IRA at Vanguard (Location: U.S.)					
Vanguard Inter. Term Corp. Bond [MF]	SP	03/18/2020	S (partial)	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
DESCRIPTION: Class: The Michael H. Simon Rollover IRA at Vanguard (Location: U.S.)					
Vanguard Inter. Term Corp. Bond [MF]	SP	03/23/2020	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
DESCRIPTION: Class: The Michael H. Simon Rollover IRA at Vanguard (Location: U.S.)					
Vanguard Mid-Cap ETF [EF]	JT	05/15/2020	P	\$100,001 - \$250,000	
Vanguard Mid-Cap ETF [EF]	JT	08/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard PRIMECAP Mut. Fund [MF]	SP	01/2/2020	P	\$15,001 - \$50,000	
DESCRIPTION: Class: The Michael H. Simon Rollover IRA at Vanguard (Location: U.S.)					



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo Emerg. Mkts. Equity [MF]	JT	02/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Wells Fargo Emerg. Mkts. Equity [MF]	JT	03/6/2020	P	\$480.00	
Wells Fargo Emerg. Mkts. Equity [MF]	JT	03/25/2020	P	\$1,001 - \$15,000	
Wells Fargo Emerg. Mkts. Equity [MF]	JT	05/15/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Wells Fargo Emerg. Mkts. Equity [MF]	JT	08/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Wells Fargo Short Term Muni. Bond [MF]	JT	02/14/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Short Term Muni. Bond [MF]	JT	03/6/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Short Term Muni. Bond [MF]	JT	03/25/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Short Term Muni. Bond [MF]	JT	05/15/2020	P	\$1,001 - \$15,000	
Wells Fargo Short Term Muni. Bond [MF]	JT	08/14/2020	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Western Asset Interim. Term Muni. [MF]	JT	02/14/2020	P	\$1,001 - \$15,000	
Western Asset Interim. Term Muni. [MF]	JT	03/6/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Western Asset Interim. Term Muni. [MF]	JT	03/25/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Western Asset Interim. Term Muni. [MF]	JT	05/15/2020	P	\$1,001 - \$15,000	
Western Asset Interim. Term Muni. [MF]	JT	08/14/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

\* 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
United States Judges (Administrative Office of U.S. Courts)	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.

## 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. Suzanne Bonamici , 07/7/2021