



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Derek Kilmer  
**Status:** Member  
**State/District:** WA06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 08/8/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Artisan International Value CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Artisan INTL Value I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Blackrock High Yield Bond K [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Blackrock High Yield Bond K [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Core Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Core Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Core Plus Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Core Plus Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder INTL Equity [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bridge Builder INTL Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Large Growth [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Large Growth [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Large Value [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Large Value [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder Smallmid Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder Smallmid Growth [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Bridge Builder Smallmid Value [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Bridge Builder Smallmid Value [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Capital Income Builder Fund Cl A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Capital Income Builder Fund CL A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Clgam 529 College 2024A [5P]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
LOCATION: WA					
Clgam 529 College 2027A [5P]	DC	\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
LOCATION: WA					
Edward Jones ⇒ Goldman Sachs FINL Square Govt Fd Instl [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones Insured Bank Money Market [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Retirement Money Market [BA]		\$1 - \$1,000	Interest	None	<input type="checkbox"/>
Edward Jones Retirment Money Market [BA]	SP	\$1 - \$1,000	Interest	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Goldman FS Government I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: purchase					
Gp INTL Stalwarts I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Grandeur Peak International Stalwarts Cl I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Hotchkis & Wiley Funds High Yield Fund Cl I [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Hotchkis & Wiley High-Yield [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
iShares MSCI EAFE Small Cap Et [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
iShares MSCI EAFE SSmall Cap Et [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
iShares Rus Mid Cap ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Russ 2000 Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
iShares Russell 1000 ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
iShares Russell 1000 Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
iShares Russell 2000 Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
iShares Russell Midcap Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Kitsap Bank Checking [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
McKinsey & Co. Profit Sharing Retirement Plan and Money Purchase Pension Plan [PE]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
NC Property [RP]	SP	\$50,001 - \$100,000	Rent	None	<input type="checkbox"/>
LOCATION: Sunset Beach, NC, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard FTSE Developed Markets ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Vanguard FTSE Developed Markets ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Vanguard Index TR Vanguard Value ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Vanguard Index TR Vanguard Value ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
WA State PERS Plan 2 [DB]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
WA State PERS Plan 2 [DB]		\$15,001 - \$50,000	None		<input type="checkbox"/>

\* 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?
Artisan International Value CL [MF]		06/10/2020	P	\$1,001 - \$15,000	
Artisan International Value CL [MF]	SP	06/10/2020	P	\$1,001 - \$15,000	
Blackrock High Yield Bond K [MF]		06/10/2020	P	\$1,001 - \$15,000	
Blackrock High Yield Bond K [MF]	SP	06/10/2020	P	\$1,001 - \$15,000	
Bridge Builder Core Bond Fund [MF]		03/24/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bridge Builder Core Bond Fund [MF]	SP	03/24/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bridge Builder Core Plus Bond Fund [MF]		03/24/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bridge Builder Core Plus Bond Fund [MF]	SP	03/24/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Bridge Builder INTL Equity [MF]	SP	06/10/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bridge Builder INTL Equity [MF]		06/10/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Bridge Builder Large Growth [MF]		06/10/2020	P	\$1,001 - \$15,000	
Bridge Builder Large Growth [MF]		06/10/2020	P	\$1,001 - \$15,000	
Bridge Builder Large Growth [MF]	SP	06/10/2020	P	\$1,001 - \$15,000	
Bridge Builder Large Growth [MF]	SP	06/10/2020	P	\$1,001 - \$15,000	
Bridge Builder Large Value [MF]		03/24/2020	P	\$1,001 - \$15,000	
Bridge Builder Smallmid Value [MF]	SP	03/24/2020	P	\$1,001 - \$15,000	
Bridge Builder Smallmid Value [MF]		03/24/2020	P	\$1,001 - \$15,000	
Grandeur Peak INTL [MF]		10/16/2020	P	\$1,001 - \$15,000	
Grandeur Peak INTL [MF]	SP	10/16/2020	P	\$1,001 - \$15,000	
Hotchkis & Wiley Funds High Yield Fund Cl I [MF]		06/10/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Hotchkis & Wiley High Yield [MF]	SP	06/10/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
iShares MSCI EAFE Small Cap FD [EF]		06/10/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares MSCI EAFE Small Cap FD [EF]		10/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
iShares MSCI EAFE Small Cap FD [EF]	SP	06/10/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares MSCI EAFE Small Cap FD [EF]	SP	10/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
iShares Russell 1000 Fund [EF]	SP	06/10/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares Russell 1000 Fund [EF]		06/10/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares Russell 2000 Fund [EF]	SP	06/10/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares Russell 2000 Fund [EF]		06/10/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard FTSE Developed Markets ETF [EF]	SP	03/24/2020	P	\$1,001 - \$15,000	
Vanguard FTSE Developed Markets ETF [EF]	SP	06/10/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard FTSE Developed Markets ETF [EF]		03/24/2020	P	\$1,001 - \$15,000	
Vanguard FTSE Developed Markets ETF [EF]		06/10/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Index TR Vanguard Value ETF [EF]	SP	03/24/2020	P	\$1,001 - \$15,000	

\* 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
State of Washington	Spouse Salary	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	US Bank	January 2016	Mortgage on residence	\$100,001 - \$250,000
JT	Chase Bank	August 2019	Credit Card	\$10,000 - \$15,000
JT	Kitsap Bank	September 2020	Home Mortgage	\$100,001 - \$250,000
JT	US Bank	October 2020	Home Mortgage	\$100,001 - \$250,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
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### SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee (uncompensated)	Princeton University

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2005	State of Washington	Public Employees Retirement System Plan 2
October 1999	McKinsey and Company Profit Sharing Retirement/Pension Plan	Retirement plan managed for McKinsey and Co. by Alight

### SCHEDULE G: GIFTS

None disclosed.

### SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Princeton University	01/16/2020	01/18/2020	Washington, DC - Princeton, NJ - Seattle, WA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
New Democrat Action Fund	02/24/2020	02/25/2020	Seattle, WA - Newark, NJ - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

### SCHEDULE A AND B ASSET CLASS DETAILS

o Edward Jones
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### 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. Derek Kilmer , 08/8/2021