FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Ruben Gallego

Status: Member State/District: AZo7

FILING INFORMATION

Filing Type: Annual Report

Filing Year: 2020

Filing Date: 08/9/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Aspiration Checking Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	
Aspiration Redwood Fund [MF]		\$50,001 - \$100,000	Capital Gains	\$1 - \$200	<u> </u>
Chase Bank Checking Account [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	
City of Phoenix 401A ⇒ Vanguard Institutional Index Fund Institutional Plus Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		
National Association of Realtors 401K ⇒ T Rowe Price Retirement 2055 Fund (TRRNX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
National Association of Realtors Pension Plan [DB]	SP	Undetermined	None		
Nationwide 401k Riester Public Relations ⇒ American Funds AMCAP Fund R6 (RAFGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Nationwide 401k Riester Public Relations ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Funds New Perspective R6 Fund (RNPGX) [MF]					
Nationwide 401k Riester Public Relations ⇒ Vanguard Mid-Cap Index Fund Admiral Shares (VIMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
PAC Common Founders Stock Series A [PS]		\$1,001 - \$15,000	None		
DESCRIPTION: PAC Common Founders is a startup business trying the Phoenix, Arizona.	to create an	online bank to serve	the Latino community	. It is located	l in
Strategies 360 401K ⇒ Vanguard Target Retirement 2045 Fund (VTIVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
UBS Simple IRA ⇒ JP Morgan Smart Retirement Fund 2055 (JFFCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
United Services Auto Association Checking Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	

SCHEDULE B: TRANSACTIONS

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
Aspiration Redwood Fund [MF]	05/18/2020	S (partial)	\$1,001 - \$15,000	
Aspiration Redwood Fund [MF]	02/20/2020	S (partial)	\$15,001 - \$50,000	П
Aspiration Redwood Fund [MF]	06/9/2020	S (partial)	\$15,001 - \$50,000	П
Aspiration Redwood Fund [MF]	06/9/2020	S (partial)	\$1,001 - \$15,000	П

^{*} Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit $\underline{\text{https://fd.house.gov/reference/asset-type-codes.aspx}}.$

SCHEDULE C: EARNED INCOME

Source	Туре	Amount
National Association of Realtors	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Loan Depot	April 2020	Real Property Mortgage	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Chair, Board of Directors	Congressional Hispanic Caucus Institute

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2008	Myself and City of Phoenix	Pension that will provide benefit upon retirement.
March 2019	Spouse and National Association of Realtors	Pension that will provide benefit upon retirement.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

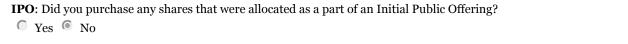
SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- City of Phoenix 401A
 - Description: 401A account from my employment at the City of Phoenix.
- National Association of Realtors 401K (Owner: SP)
- Nationwide 401k Riester Public Relations
 - Description: 401K from my work at Riester Public Relations
- Strategies 360 401K
 - Description: 401k from my work at Strategies 360.
- UBS Simple IRA (Owner: SP)

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. Ruben Gallego, 08/9/2021