



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Chrissy Houlahan  
**Status:** Member  
**State/District:** PA06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 08/12/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank Accounts ⇒ Ardent Credit Union [BA]	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Bank Accounts ⇒ Wells Fargo [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Discovery Growth Fund [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Discovery Value Fund [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Emerging Markets Portfolio [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ AB Small Cap Core Portfolio [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒	JT	\$250,001 -	Capital Gains,	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
AB Sustain Global Theme [MF]		\$500,000	Dividends		
Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [GS]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF]	JT	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF]	JT	\$100,001 - \$250,000	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF]	SP	\$100,001 - \$250,000	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Barton W Houlahan IRA Rollover ⇒ AllianceBernstein All Market R Class [MF]	SP	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Growth Fund [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Discovery Value Fund [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Emerging Markets Portfolio [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Intl Strategic Equities [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Small Cap Core Portfolio [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Sustain Global Theme [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Christina J Houlahan IRA 13743 ⇒ AB All Market Class [MF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF]		\$100,001 - \$250,000	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Christina J Houlahan Trust 50974 ⇒ Bernstein Diversified Municipal Portfolio [GS]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<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?
Bart and Christina Houlahan 03694 ⇒ AB Discovery Value Fund [MF]	JT	12/11/2020	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF]	JT	12/11/2020	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Intl Strategic Equities [MF]	JT	12/1/2020	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF]	JT	12/10/2020	P	\$15,001 - \$50,000	
Bart and Christina Houlahan 03694 ⇒ AB Sustain Global Theme [MF]	JT	10/9/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Bart and Christina Houlahan 03694 ⇒ Bernstein Diversified Municipal Portfolio [MF]	JT	10/9/2020	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay A [MF]	JT	10/9/2020	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF]	JT	12/16/2020	P	\$1,001 - \$15,000	
Bart and Christina Houlahan 03694 ⇒ Tax Aware Overlay B [MF]	JT	10/9/2020	P	\$15,001 - \$50,000	
Barton W Houlahan IRA Rollover ⇒ AB All Market Class [MF]	SP	09/30/2020	P	\$1,001 - \$15,000	
Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF]	SP	12/16/2020	P	\$1,001 - \$15,000	
Barton W Houlahan IRA Rollover ⇒ AB Wealth Appreciation Strategy [MF]	SP	09/30/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Barton W. Houlahan Irrevocable Trust 33482 ⇒ AB Intl Strategic Equities [MF]	SP	12/11/2020	P	\$1,001 - \$15,000	
Barton W. Houlahan Irrevocable Trust 33482 ⇒	SP	12/10/2020	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
AB Sustain Global Theme [MF]					
Christina J Houlahan IRA 13743 ⇒ AB All Market Class [MF]		09/30/2020	P	\$1,001 - \$15,000	
Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF]		12/16/2020	P	\$1,001 - \$15,000	
Christina J Houlahan IRA 13743 ⇒ AB Wealth Appreciation Strategy [MF]		09/30/2020	S (partial)	\$1,001 - \$15,000	<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 C: EARNED INCOME

Source	Type	Amount
B Lab	Spouse Salary	\$205,010.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Ardent Credit Union	September 2020	Mortgage of Primary Residence	\$500,001 - \$1,000,000

### 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.

## SCHEDULE A AND B ASSET CLASS DETAILS

- o Bank Accounts (Owner: JT)  
LOCATION: US
- o Bart and Christina Houlahan 03694 (Owner: JT)  
LOCATION: US
- o Barton W Houlahan IRA Rollover (Owner: SP)  
DESCRIPTION: IRA
- o Barton W. Houlahan Irrevocable Trust 33482 (Owner: SP)
- o Christina J Houlahan IRA 13743
- o Christina J Houlahan Trust 50974

## 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. Chrissy Houlahan , 08/12/2021