



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Kweisi Mfume  
**Status:** Member  
**State/District:** MD07

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2020  
**Filing Date:** 08/13/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Allianz Life Variable Annuity [PE]		\$500,001 - \$1,000,000	Tax-Deferred		
DESCRIPTION: This is a retirement variable annuity					
Investacorp Inc. (S.E.P.) [PE]		\$100,001 - \$250,000	Tax-Deferred		
John Hancock Life Insurance Company [PE]		Undetermined	Pension	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: This represents the annual pension payment from a previous employment. These payments ended in May 2021 as the asset was rolled into an IRA with Merrill Lynch. The new IRA asset is now also reported in schedule A.					
Maryland State Retirement Agency [PE]		Undetermined	Pension	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: This represents my annual State of Maryland pension payment.					
Merrill Lynch Wealth Mgmt [IH]		\$250,001 - \$500,000	Tax-Deferred		
Office of Personnel Management [DB]		Undetermined	Pension/Annuity	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: This is my annual federal pension payment.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Social Security Benefits [PE]		Undetermined	Annual Benefit	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: This represents my annual Social Security payment.					

\* 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
Morgan State University,	Spouse's Employment	\$131,028.00	\$128,917.00
Tompkins Cortland Community College,	Spouse's Honorarium	N/A	\$3,500.00
Teachers College, Columbia University,	Spouse's Honorarium	N/A	\$900.00
Commonwealth of Kentucky,	Spouse's Honorarium	N/A	\$2,000.00
Florida International University,	Spouse's Honorarium	N/A	\$500.00
Rowman & Littlefield	Spouse's Book Royalty	\$719.54	\$303.00
U.S. Congress	Salary	N/A	\$89,157.00

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
Board Chairman	Morgan State University
Vice Chairman	Research America
Commissioner	Maryland Commission on African American History and Culture

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2005	John Hancock and myself	This was a continued participation standard defined benefit pension agreement. John Hancock was not the original signatory to the agreement but took control of the retirement account when it acquired the assets of the original pension company. This agreement concluded in May of 2021 when assets were liquidated then rolled into an IRA with Merrill Lynch and reported in Schedule A

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

None disclosed.

### **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. Kweisi Mfume , 08/13/2021