

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jay Chen

Status: Congressional Candidate

State/District: CA39

FILING INFORMATION

Filing Type: Candidate Report

Filing Year: 2021

Filing Date: 08/13/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner Value of Asset	Type(s)	Income Current Year to Filing	Income Preceding Year
529 Savings ⇒ NH Aggressive Growth Port (Fidelity FDS) [5P] LOCATION: NH	\$1,001 - \$15,000	None		
529 Savings ⇒ NH Aggressive Growth Port (FIDELITY INDX) [5P] LOCATION: NH	\$1,001 - \$15,000	None		
529 Savings ⇒ NH Fidelity 500 Index [5P] Location: NH	\$1,001 - \$15,000	None		
529 Savings ⇒ NH International Index [5P] Location: NH	\$1,001 - \$15,000	None		
529 Savings ⇒ NH Total Market Index [5P] LOCATION: NH	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 Savings 1 ⇒ NH Portfolio 2033 (Fidelity Fund PORT) [5P] LOCATION: NH		\$15,001 - \$50,000	None		
529 Savings 2 ⇒ NH Aggressive Growth Port (Fidelity FDS) [5P] LOCATION: NH		\$1,001 - \$15,000	None		
529 Savings 2 ⇒ NH Fidelity 500 Index [5P] LOCATION: NH		\$15,001 - \$50,000	None		
529 Savings 2 ⇒ NH International Index [5P] Location: NH		\$1,001 - \$15,000	None		
529 Savings 2 ⇒ NH Moderate Growth Port (Fidelity Indx) [5P] LOCATION: NH		\$1,001 - \$15,000	None		
529 Savings 2 ⇒ NH Total Market Index [5P] Location: NH		\$1,001 - \$15,000	None		
Adobe Inc. (ADBE) [ST]		\$15,001 - \$50,000	None		
Advanced Micro Devices, Inc. (AMD) [ST]		\$1,001 - \$15,000	None		I
Airbnb, Inc Class A (ABNB) [ST]		\$1,001 - \$15,000	None		
Airbnb, Inc Class A (ABNB) [ST] DESCRIPTION: Morgan Stanley Acct		\$15,001 - \$50,000	None		
Alphabet Inc Class C Capital Stock (GOOG) [ST]		\$15,001 - \$50,000	None		
Amazon.com, Inc. (AMZN) [ST]		\$15,001 - \$50,000	None		
American Tower Corporation (AMT) [ST]		\$1,001 - \$15,000	None		
Apollo Medical Holdings, Inc. (AMEH) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
ARK Innovation ETF (ARKK) [ST]		\$1,001 - \$15,000	None		
BTC [OT] DESCRIPTION: Bitcoin cryptocurrency		\$1,001 - \$15,000	None		
Chipotle Mexican Grill, Inc. (CMG) [ST]		\$1,001 - \$15,000	None		
Citibank Checking [BA]		\$1,001 - \$15,000	None		
Coinbase Global, Inc Class A (COIN) [ST]		\$1,001 - \$15,000	None		
Colegio Capital Inc [OL] LOCATION: Hacienda Heights, CA, US DESCRIPTION: Real estate management company		Undetermined	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Commercial Property Downtown Los Angeles [RP] LOCATION: Los Angeles, CA, US		\$500,001 - \$1,000,000	None		
Commercial Property Los Angeles [RP] Location: Los Angeles, CA, US Description: Koreatown Property		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
Commercial Property Pasadena [RP] LOCATION: Pasadena, CA, US		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Commercial Property Santa Monica [RP] LOCATION: Santa Monica, CA, US		\$500,001 - \$1,000,000	None		
CoStar Group, Inc. (CSGP) [ST]		\$1 - \$1,000	None		
Costco Wholesale Corporation (COST) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Domino's Pizza Inc (DPZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DraftKings Inc Class A (DKNG) [ST]		\$1,001 - \$15,000	None		

Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
	\$1,001 - \$15,000	None		
	\$15,001 - \$50,000	None		
	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
	\$1 - \$1,000	None		
	\$1,001 - \$15,000	None		
	\$1,001 - \$15,000	None		
	\$1,001 - \$15,000	None		
	\$1,001 - \$15,000	None		
	\$1,001 - \$15,000	None		
	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
	\$1 - \$1,000	None		
	\$1,001 - \$15,000	None		
	\$100,001 - \$250,000	Interest	\$201 - \$1,000	\$201 - \$1,000
	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
	\$100,001 - \$250,000	Dividends, Interest	\$1 - \$200	None
	\$1,001 - \$15,000	None		
	\$1,001 - \$15,000	None		
	\$1,001 - \$15,000	None		
	Owner	\$1,001 - \$15,000 \$15,001 - \$50,000 \$1,001 - \$15,000 \$1 - \$1,000 \$1,001 - \$15,000 \$1,001 - \$15,000	\$1,001 - \$15,000 None \$15,001 - \$50,000 None \$1,001 - \$15,000 Interest \$1 - \$1,000 None \$1,001 - \$15,000 Interest \$100,001 - \$250,000 Interest \$100,001 - \$15,000 Interest \$100,001 - \$15,000 Interest \$100,001 - \$15,000 None \$1,001 - \$15,000 None \$1,001 - \$15,000 None \$1,001 - \$15,000 None	\$1,001 - \$15,000 None \$15,001 - \$50,000 None \$1,001 - \$15,000 Interest \$201 - \$1,000 \$1 - \$1,000 None \$1,001 - \$15,000 Interest \$1 - \$200 \$1,001 - \$15,000 Interest \$1 - \$200 \$1,001 - \$15,000 Interest \$1 - \$200 \$100,001 - \$250,000 Interest \$1 - \$200 \$100,001 - \$250,000 None \$1,001 - \$15,000 None \$1,001 - \$15,000 None \$1,001 - \$15,000 Interest \$1 - \$200 \$100,001 - \$15,000 None \$1,001 - \$15,000 None \$1,001 - \$15,000 None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Nintendo Co Ltd ADR (NTDOY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
NVIDIA Corporation (NVDA) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Palantir Technologies Inc. Class A (PLTR) [ST]		\$15,001 - \$50,000	None		
PayPal Holdings, Inc. (PYPL) [ST]		\$15,001 - \$50,000	None		
Peloton Interactive, Inc. (PTON) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Adobe Inc. (ADBE) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Advanced Micro Devices, Inc. (AMD) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Airbnb, Inc Class A (ABNB) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Alphabet Inc Class C Capital Stock (GOOG) [ST]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ Amazon.com, Inc. (AMZN) [ST]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ American Express Company (AXP) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Apollo Medical Holdings, Inc. (AMEH) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ ARK Innovation ETF (ARKK) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Chipotle Mexican Grill, Inc. (CMG) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Cogent Communications Holdings, Inc. (CCOI)		\$1,001 - \$15,000	None		

Asset	Owner Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[ST]				
Profit Sharing Keogh ⇒ CoStar Group, Inc. (CSGP) [ST]	\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Costco Wholesale Corporation (COST) [ST]	\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ CVS Health Corporation (CVS) [ST]	\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ DaVita Inc. (DVA) [ST]	\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ Delta Air Lines, Inc. (DAL) [ST]	\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ DocuSign, Inc. (DOCU) [ST]	\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Dollar General Corporation (DG) [ST]	\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Domino's Pizza Inc (DPZ) [ST]	\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Facebook, Inc Class A (FB) [ST]	\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ Goldman Sachs Group, Inc. (GS) [ST]	\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ GrubHub Inc. (GRUB) [ST]	\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Humana Inc. (HUM) [ST]	\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Ingersoll Rand Inc. (IR) [ST]	\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Invesco NASDAQ Next Gen 100 ETF (QQQJ) [ST]	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Profit Sharing Keogh ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Marriott International - Class A (MAR) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Mastercard Incorporated (MA) [ST]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ Moody's Corporation (MCO) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Netflix, Inc. (NFLX) [ST]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ Nintendo Co Ltd ADR (NTDOY) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Northrop Grumman Corporation (NOC) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Norwegian Cruise Line Holdings Ltd. Ordinary Shares (NCLH) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ NVIDIA Corporation (NVDA) [ST]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ Palantir Technologies Inc. Class A (PLTR) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ PayPal Holdings, Inc. (PYPL) [ST]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Poshmark, Inc Class A (POSH) [ST]					
Profit Sharing Keogh ⇒ RH (RH) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Simplify U.S. Equity PLUS GBTC ETF (SPBC) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Snap Inc. Class A (SNAP) [ST]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ Snowflake Inc. Class A (SNOW) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ SPDR S&P 500 (SPY) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Square, Inc. Class A (SQ) [ST]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ Target Corporation (TGT) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Tesla, Inc. (TSLA) [ST]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ Vectrus, Inc. (VEC) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	None		
Profit Sharing Keogh ⇒ Walt Disney Company (DIS) [ST]		\$15,001 - \$50,000	None		
ProLogis, Inc. (PLD) [ST]		\$1,001 - \$15,000	None		
Public Storage (PSA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Radius Bank Rewards Checking [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
RadNet, Inc. (RDNT) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ResMed Inc. (RMD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
RH (RH) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ Alphabet Inc Class C Capital Stock (GOOG) [ST]		\$15,001 - \$50,000	None		
Rollover IRA ⇒ AppFolio, Inc Class A (APPF) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ Booking Holdings Inc. (BKNG) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ Broadcom Inc. (AVGO) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ CACI International, Inc. Class A (CACI) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ CoStar Group, Inc. (CSGP) [ST]		\$1,001 - \$15,000	None		
Rollover IRA \Rightarrow Costco Wholesale Corporation (COST) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ DaVita Inc. (DVA) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ Delta Air Lines, Inc. (DAL) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ Facebook, Inc Class A (FB) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ General Electric Co MTN [CS]		\$1,001 - \$15,000	Tax-Deferred		
Description: Rollover IRA					
Rollover IRA ⇒		\$1,001 - \$15,000	None		

Asset	Owner Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Goldman Sachs Group, Inc. (GS) [ST]				
Rollover IRA \Rightarrow Home Depot, Inc. (HD) [ST]	\$1,001 - \$15,000	None		
Rollover IRA ⇒ Humana Inc. (HUM) [ST]	\$1,001 - \$15,000	None		
Rollover IRA \Rightarrow Ingersoll Rand Inc. (IR) [ST]	\$1,001 - \$15,000	None		
Rollover IRA \Rightarrow JP Morgan Chase & Co. (JPM) [ST]	\$1,001 - \$15,000	None		
Rollover IRA ⇒ Lockheed Martin Corporation (LMT) [ST]	\$1,001 - \$15,000	None		
Rollover IRA ⇒ Mastercard Incorporated (MA) [ST]	\$1,001 - \$15,000	None		
Rollover IRA ⇒ MGM Resorts International (MGM) [ST]	\$1,001 - \$15,000	None		
Rollover IRA ⇒ Microsoft Corporation (MSFT) [ST]	\$1,001 - \$15,000	None		
Rollover IRA ⇒ Moody's Corporation (MCO) [ST]	\$1,001 - \$15,000	None		
Rollover IRA ⇒ Netflix, Inc. (NFLX) [ST]	\$1,001 - \$15,000	None		
Rollover IRA ⇒ Northrop Grumman Corporation (NOC) [ST]	\$1,001 - \$15,000	None		
Rollover IRA ⇒ NVIDIA Corporation (NVDA) [ST]	\$1,001 - \$15,000	None		
Rollover IRA ⇒ Palantir Technologies Inc. Class A (PLTR) [ST]	\$1 - \$1,000	None		
Rollover IRA ⇒ PayPal Holdings, Inc. (PYPL) [ST]	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rollover IRA ⇒ Southwest Airlines Company (LUV) [ST]		\$1,001 - \$15,000	None		
Rollover IRA \Rightarrow Square, Inc. Class A (SQ) [ST]		\$15,001 - \$50,000	None		
Rollover IRA \Rightarrow Target Corporation (TGT) [ST]		\$1,001 - \$15,000	None		
Rollover IRA \Rightarrow Tesla, Inc. (TSLA) [ST]		\$1,001 - \$15,000	None		I
Rollover IRA \Rightarrow The Blackstone Group Inc. (BX) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	None		
Rollover IRA ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	None		
ROTH IRA ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	None		
ROTH IRA \Rightarrow Marriott International - Class A (MAR) [ST]		\$1 - \$1,000	None		
ROTH IRA ⇒ Palantir Technologies Inc. Class A (PLTR) [ST]		\$1 - \$1,000	None		
ROTH IRA for Minor 1 ⇒ Alphabet Inc Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	None		
ROTH IRA for Minor 1 ⇒ Apple Inc. (AAPL) [ST]		\$1 - \$1,000	None		
ROTH IRA for Minor 1 ⇒ Facebook, Inc Class A (FB) [ST]		\$1 - \$1,000	None		
ROTH IRA for Minor 1 ⇒ Mastercard Incorporated (MA) [ST]		\$1 - \$1,000	None		
ROTH IRA for Minor 1 ⇒ Palantir Technologies Inc. Class A (PLTR) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ROTH IRA for Minor 1 ⇒ PayPal Holdings, Inc. (PYPL) [ST]		\$1 - \$1,000	None		1
ROTH IRA for Minor 2 ⇒ Apollo Medical Holdings, Inc. (AMEH) [ST]		\$1 - \$1,000	None		
ROTH IRA for Minor 2 ⇒ Microsoft Corporation (MSFT) [ST]		\$1 - \$1,000	None		
ROTH IRA for Minor 2 ⇒ Palantir Technologies Inc. Class A (PLTR) [ST]		\$1 - \$1,000	None		
Schools First 457B [MF]		\$50,001 - \$100,000	Tax-Deferred		
SEI Private Trust [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Sherwin-Williams Company (SHW) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Snap Inc. Class A (SNAP) [ST]		\$15,001 - \$50,000	None		
Snowflake Inc. Class A (SNOW) [ST]		\$1,001 - \$15,000	None		
Sony Group Corporation American Depositary Shares (SONY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SPDR Gold Trust (GLD) [ST]		\$1,001 - \$15,000	None		
SPDR S&P 500 (SPY) [ST]		\$1,001 - \$15,000	None		
Square, Inc. Class A (SQ) [ST]		\$15,001 - \$50,000	None		
Tesla, Inc. (TSLA) [ST]		\$15,001 - \$50,000	None		
Vectrus, Inc. (VEC) [ST]		\$1,001 - \$15,000	None		
Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Visa Inc. (V) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Zillow Group, Inc Class C Capital Stock (Z) [ST]	\$1,001 - \$15,000	None		
Zoom Video Communications, Inc Class A (ZM) [ST]	\$15,001 - \$50,000	None		

^{*} 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 Current Year to Filing	Amount Preceding Year
State of California	Spouse compensation	N/A	N/A
Mount San Antonio College	Trustee Stipend	\$3,750.00	\$3,750.00
Colegio Capital Inc	Salary	\$60,000.00	\$120,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Туре	Amount of Liability
	East West Bank	April 2019	Mortgage on commercial property	\$500,001 - \$1,000,000
SP	Citibank	2006	Student loan	\$10,000 - \$15,000

SCHEDULE **E**: **P**OSITIONS

Position	Name of Organization
Governing Board Member	Mount San Antonio Community College
Commissioner	Los Angeles County Library Commission
Member	New World Investments LLC
Member	Santa Monica commercial property (LLC)
Member	Pasadena commercial property (LLC)
Member	Los Angeles commercial property (LLC)

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

0	529 Savings
	LOCATION: NH

- 529 Savings 1 Location: NH
- 529 Savings 2 LOCATION: NH
- Profit Sharing Keogh
- Rollover IRA
- ROTH IRA
- o ROTH IRA for Minor 1
- o ROTH IRA for Minor 2

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?

C 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?

C 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: Jay Chen, 08/13/2021