



Filing ID #10039697

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Lydia Bean
Status: Congressional Candidate
State/District: TX06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 03/31/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Baylor Retirement Plan ⇒ CREF Social Choice R2 [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Investments ⇒ Carnival Corporation (CCL) [ST]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Fidelity Investments ⇒ D/B/A Royal Caribbean Cruises Ltd. (RCL) [ST]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Guideline Retirement Plan ⇒ VBTLX [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Guideline Retirement Plan ⇒ VEMAX, Vanguard Emerging Markets Stock Index [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Guideline Retirement Plan ⇒ VGSIX, Vanguard Real Estate Index [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Guideline Retirement Plan ⇒ VTMGX, Vanguard Developed Markets Index [MF]	SP	\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Guideline Retirement Plan ⇒ VTSAX, Vanguard Total Stock Market Index [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
LPL Financial Retirement Account ⇒ BIAWX, Brown Advisory Sustainable Growth Investor CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
LPL Financial Retirement Account ⇒ CVMIX, Calvert Emerging Markets Equity CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		
LPL Financial Retirement Account ⇒ DOMYX, Domini Impact Intl Equity CL Y [MF]		\$1,001 - \$15,000	Tax-Deferred		
LPL Financial Retirement Account ⇒ PORIX, Trillium ESG Global Equity Instl CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
LPL Financial Retirement Account ⇒ PRBLX, Parnassus Core Equity Investor CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
LPL Financial Retirement Account ⇒ PXLIX, Pax Large Cap Instl CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
LPL Financial Retirement Account ⇒ PXSIX, PAX Small Cap Instl CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
LPL Financial Retirement Account ⇒ PXWIX, Pax Ellevest Global Womens Leadership Instl CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
LPL Financial Retirement Account ⇒ TSBHX, TIAA CREF Social Choice Bond Advisor CL [MF]		\$1 - \$1,000	Tax-Deferred		
LPL Financial Retirement Account ⇒ VTBX, Vanguard Total International Bond Index [MF]		\$1 - \$1,000	Tax-Deferred		

* 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 Current Year to Filing	Amount Preceding Year
RE:site Studio (Allbritton Lee LLC)	Spouse Salary	\$14,307.00	\$46,734.00
RE:site Studio (Allbritton Lee LLC)	Owners Draw	\$.00	\$108,000.00
RE:site Studio	Salary	\$.00	\$1,188.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Bank	6/22/2017	Home Mortgage	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board President	Whistleblower Aid
Fellow	New America
Business Director	RE:site Studio
Faculty Research Associate	University of Texas-Arlington

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

◦ Baylor Retirement Plan ◦ Fidelity Investments (Owner: SP) LOCATION: US ◦ Guideline Retirement Plan (Owner: SP) ◦ LPL Financial Retirement Account
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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: Lydia Bean , 03/31/2021