Financial Disclosure Report

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Filer Information

Name: Elizabeth Kreiselmaier
Status: Congressional Candidate
State/District: WA06

Filing Information

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 05/14/2021

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Advanced Micro Devices, Inc. (AMD) [ST]	SP	$1,001 - $15,000	Capital Gains	Not Applicable	Not Applicable
Description: spouse owns 100 shares of AMD stock held in his Schwab One brokerage account at Charles Schwab. Income for each period was marked N/A because the stock hasn't been sold yet, so no income has been generated. The total cost basis for the shares is 724.95 and the total current value is $3062.06					
Albert Nelson Jackson Family Limited Partnership (FLP) [EQ]	SP	Undetermined	Capital Gains, Dividends, Excepted/Blind Trust, Interest, distributions at discretion of spouse's parents, Rent	$15,001 - $50,000	$15,001 - $50,000
Description: Spouse is listed in this trust as owning a 3.77% share of the total assets, which are under the complete control of his parents. He is not informed of or involved in decision-making about any of its assets. His parents make periodic distributions to spouse as one of their 3 sons. Value and type of assets held are unknown, but we believe consist of a variety of investment vehicles/income streams checked above.					
BNY Mellon Common Stock [OT]	SP	$15,001 - $50,000	Tax-Deferred		
Description: Employer Stock held in spouse's 401k retirement account from his former employer (Mellon Capital)					
Brent's savings account [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Description: Chase bank savings account for our son who is a freshman in college					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Brighthouse Variable Annuity Series XC [OT]		$15,001 - $50,000	Tax-Deferred		
Description: IRA variable annuity account for Elizabeth Kreiselmaier held at Brighthouse Financial which is part of Brighthouse Life Insurance Company in Des Moines, IA					
Business Classic checking account [BA]		$15,001 - $50,000	None		
Description: Business checking account at Chase Bank for Elizabeth Kreiselmaier					
Business Select Savings account [BA]		$1 - $1,000	Interest	None	None
Description: Business savings account at Chase Bank for Elizabeth Kreiselmaier					
Cash and Sweep Money Market Fund [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	$1 - $200
Description: Cash in Money Market "cash & sweep" account of Chase Bank Brokerage account					
Cash and Sweep Money Market Fund [BA]	JT	$1,001 - $15,000	Interest	None	None
Description: Separate small ($1000) Money Market "Cash & Sweep" account at Chase Bank					
Chase Plus Savings [BA]		$100,001 - $250,000	Interest	$1 - $200	$1 - $200
Description: Joint savings account at Chase bank					
Checking account [BA]	JT	$15,001 - $50,000	None		
Description: Joint personal checking account at Chase Bank					
CREF Global Equities [MF]		$15,001 - $50,000	Tax-Deferred		
Description: one of several mutual funds in Elizabeth Kreiselmaier's TIAA-CREF retirement account from her former employer (WestEd)					
CREF Growth R2 [MF]		$15,001 - $50,000	Tax-Deferred		
Description: one of several mutual funds in Elizabeth Kreiselmaier's TIAA-CREF retirement account from her former employer (WestEd)					
CREF Stock R2 [MF]		$15,001 - $50,000	Tax-Deferred		
Description: one of several mutual funds that are part of Elizabeth Kreiselmaier's TIAA-CREF retirement account from her former employer (Wested)					
Emerging Markets Equity Fund [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Description: one of various mutual funds in spouse's former employer (Russell Investments) retirement account					
Forte Money Market - personal - NW [BA]	JT	$100,001 - $250,000	Interest	$1,001 - $2,500	$1,001 - $2,500
Description: Joint Money Market account at Opus Bank					
Gencyn Assoc Ltd [EQ]	SP	Undetermined	Excepted/Blind Trust	$201 - $1,000	$201 - $1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Spouse's parents set up and own this family trust which spouse is listed in its forming documents as having a 3.7% portion of. No income is generated to us personally (though we receive K-1s and report income on our own tax return from it) and we are not involved in selecting/distributing assets nor do we have direct benefit from this Trust. It is something that ultimately will result in an inheritance to spouse. Value is unknown.					
Global Developed Markets Equity Fund [MF]	SP	$15,001 - $50,000	Tax-Deferred		
DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account					
Global Real Asset Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		
DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account					
High School Checking Account [BA]	DC	$1 - $1,000	None		
DESCRIPTION: Chase Bank Checking account for our son who is now a freshman in college but he got the account as a high schooler					
Intl ACWI Ex-U.S. Index Fund [MF]	SP	$15,001 - $50,000	Tax-Deferred		
DESCRIPTION: one of the mutual funds held in spouse's 401k savings plan from his former employer (Mellon Capital)					
IRA Rollover Paul Kreiselmaier at Charles Schwab [IH]	SP	$100,001 - $250,000	Tax-Deferred		
DESCRIPTION: spouse's IRA Rollover held in cash at Charles Schwab					
Jackson Family Trust [EQ]	SP	Undetermined	Excepted/Blind Trust	$5,001 - $15,000	$5,001 - $15,000
DESCRIPTION: Spouse's parents set up and own this family trust which spouse is listed in its forming documents as having a 3.7% portion of. No income is generated to us personally (though we receive and report on k-1s for our own tax returns) and we are not involved in selecting/distributing assets nor do we have direct benefit from this Trust. It is something that ultimately will result in an inheritance to spouse. Value is unknown.					
Large Cap Stock Index Fund [MF]	SP	$50,001 - $100,000	Tax-Deferred		
DESCRIPTION: One of the mutual funds held in spouse's 401k savings plan account from his former employer (Mellon Capital)					
Non-U.S. Developed Markets Equity Fund [MF]	SP	$50,001 - $100,000	Tax-Deferred		
DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account					
Paul A. Kreiselmaier Irrevocable Trust [EQ]	SP	Undetermined	Capital Gains	$1,001 - $2,500	$1,001 - $2,500
DESCRIPTION: Irrevocable trust set up by spouse's parents in which we receive k-1 form for our own tax reporting but from which we derive no income, nor do we have knowledge of or input into assets held in the trust. Value unknown. Will be an inheritance at some point in the future. Both of spouse's parents are living and in control of all trusts mentioned in this financial disclosure form. This trust is held at TD Ameritrade and spouse's parents are the trustees of it and holders of it. Spouse receives					
Personal Checking account [BA]	JT	$1 - $1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Opus Bank joint checking account					
TIAA Traditional [FN]		$1,001 - $15,000	Tax-Deferred		
DESCRIPTION: TIAA Traditional annuity contract in Elizabeth Kreiselmaier's TIAA-CREF retirement account from her former employer (WestEd)					
Treasury Inflation-Protected Securities Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		
DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account					
U.S. INTERMEDIATE TERM BOND FUND [MF]	SP	$100,001 - $250,000	Tax-Deferred		
DESCRIPTION: one of various mutual funds within spouse's former employer (Russell Investments) retirement account					
U.S. Large Cap Equity Fund [MF]	SP	$15,001 - $50,000	Tax-Deferred		
DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account					
U.S. Small Cap Equity Fund [MF]	SP	$15,001 - $50,000	Tax-Deferred		
DESCRIPTION: one of various mutual funds in spouse's former employer (Russell Investments) retirement account					
Vacation Rental By Owner property [RP]	JT	$500,001 - $1,000,000	Rent	None	$2,501 - $5,000
LOCATION: Olalla / Kitsap, WA, US DESCRIPTION: vacation home rented out part-time and seasonally on VRBO Property address is 9026 SE Fragaria Rd in Olalla WA 98359 property is located in Kitsap County, WA					
Vanguard Target Retirement 2030 Inv [MF]	SP	$15,001 - $50,000	Tax-Deferred		
DESCRIPTION: Spouse's retirement account through employer (Verus Investments) held at Charles Schwab. 100% invested in Vanguard Target Retirement 2030 investment (mutual fund).					

* 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
Verus Investments	spouse salary	$225,000.00	$216,000.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Bank	May 2012	mortgage on second residence/vacation rental property in Olalla WA	$100,001 - $250,000

Schedule E: Positions

Position	Name of Organization
Board member of our neighborhood's Home Owners' Association (HOA)	Estates at Gig Harbor HOA

Schedule F: Agreements

Date	Parties To	Terms of Agreement
September 2001	WestEd/Far West Laboratory	My TIAA-CREF retirement account is still being administered by my former employer (WestEd/Far West Laboratory) in San Francisco, CA.
December 1993	Oregon Research Institute	For several years following my move from Oregon (from Oregon Research Institute) to California (Far West Lab/WestEd), I was sent periodic, very small royalty payment amounts from the sales of several instructional videos I had produced during my time working at ORI. After a number of years, I signed over the right to keep these small checks back to ORI, so that future royalties would simply be donated back to my former employer to save them the inconvenience of sending me periodic tiny checks.

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: Elizabeth Kreiselmaier , 05/14/2021