



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Christopher Deluzio
Status: Congressional Candidate
State/District: PA17

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 12/21/2021
Period Covered: 01/01/2020– 11/30/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401k Kobre & Kim LLP ⇒ 401k Kobre & Kim, LLP [BA]	SP	\$50,001 - \$100,000	Tax-Deferred		
401k Weil, Gotshal & Manges Section ⇒ 401k Weil, Gotshal & Manges Section [BA]	SP	\$100,001 - \$250,000	Tax-Deferred		
529 Account 1 - Child 1 ⇒ Aggressive Growth Portfolio [5P] LOCATION: NY		\$50,001 - \$100,000	Tax-Deferred		
529 Account 1 - Child 2 ⇒ Aggressive Growth Portfolio [5P] LOCATION: NY		\$15,001 - \$50,000	Tax-Deferred		
529 Account 2 - Child 2 ⇒ PA Target Enrollment 2038/2039 [5P] LOCATION: PA		\$15,001 - \$50,000	Tax-Deferred		
529 Account 2 - Child 1 ⇒ PA Target Enrollment 2036/2037 [5P] LOCATION: PA		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 Account 2 - Child 3 ⇒ PA Target Enrollment 2038/2039 [5P] LOCATION: PA		\$1,001 - \$15,000	Tax-Deferred		
Betterment - 0407 ⇒ Engine No. 1 Transform 500 ETF (VOTE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment - 0407 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment - 0407 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Betterment - 0407 ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment - 0407 ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment - 0407 ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment - 0407 ⇒ Vanguard Total International Bond ETF (BNDX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment - 1850 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Betterment - 1850 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Betterment - 1850 ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [ST]		\$1 - \$1,000	Tax-Deferred		
Betterment - 1850 ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [ST]		\$1 - \$1,000	Tax-Deferred		
Betterment - 1850 ⇒ Vanguard FTSE Developed Markets ETF (VEA) [ST]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Betterment - 1850 ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Betterment - 2427 ⇒ Engine No. 1 Transform 500 ETF (VOTE) [ST]		\$1 - \$1,000	Tax-Deferred		
Betterment - 2427 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Betterment - 2427 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Betterment - 2427 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [ST]		\$100,001 - \$250,000	Tax-Deferred		
Betterment - 2427 ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Betterment - 2427 ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Betterment - 2427 ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Betterment - 2427 ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Betterment - 2427 ⇒ Vanguard FTSE Developed Markets ETF (VEA) [ST]		\$1 - \$1,000	Tax-Deferred		
Betterment - 2427 ⇒ Vanguard Total International Bond ETF (BNDX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Betterment - 2999 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Betterment - 2999 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Betterment - 2999 ⇒ Vanguard FTSE Developed Markets ETF (VEA) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Betterment - 2999 ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment - 3149 ⇒ BlackRock Short Maturity Bond ETF (NEAR) [ST]	JT	None	Dividends	None	\$1 - \$200
Betterment - 3149 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Betterment - 3149 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]	JT	None	Capital Gains	None	\$1 - \$200
Betterment - 3149 ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Betterment - 3149 ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Betterment - 3149 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Betterment - 3149 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	None
Betterment - 3149 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Betterment - 3149 ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	None
Betterment - 3149 ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Betterment - 3149 ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment - 3149 ⇒	JT	\$15,001 - \$50,000	Capital Gains,	\$201 - \$1,000	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares National Muni Bond ETF (MUB) [ST]			Dividends		\$1,000
Betterment - 3149 ⇒ iShares Russell 2000 Value ETF (IWN) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Betterment - 3149 ⇒ iShares S&P 500 Value ETF (IVE) [ST]	JT	None	Capital Gains	None	\$1 - \$200
Betterment - 3149 ⇒ iShares Short Treasury Bond ETF (SHV) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Betterment - 3149 ⇒ Schwab International Equity ETF (SCHF) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	None	\$201 - \$1,000
Betterment - 3149 ⇒ Schwab U.S. Broad Market ETF (SCHB) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Betterment - 3149 ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [ST]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Betterment - 3149 ⇒ Vanguard Emerging Markets Government Bond ETF (VWOB) [ST]	JT	None	Dividends	None	\$1 - \$200
Betterment - 3149 ⇒ Vanguard FTSE Developed Markets ETF (VEA) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment - 3149 ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Betterment - 3149 ⇒ Vanguard Mid-Cap Value ETF (VOE) [ST]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment - 3149 ⇒ Vanguard Short-Term Inflation-Protected Securities Index Fund (VTIP) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
Betterment - 3149 ⇒ Vanguard Small-Cap Value ETF (VBR) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment - 3149 ⇒ Vanguard Total International Bond ETF (BNDX) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Betterment - 3149 ⇒	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Total Stock Market ETF (VTI) [ST]					\$1,000
Betterment - 3149 ⇒ Vanguard Value ETF (VTV) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Betterment - 3164 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Betterment - 3164 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]	JT	None	Capital Gains	None	\$1 - \$200
Betterment - 3164 ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [ST]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Betterment - 3164 ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Betterment - 3164 ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Betterment - 3164 ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment - 3164 ⇒ iShares National Muni Bond ETF (MUB) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment - 3164 ⇒ iShares Russell 2000 Value ETF (IWN) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Betterment - 3164 ⇒ iShares Russell Mid-cap Value ETF (IWS) [ST]	JT	None	Capital Gains	None	\$1,001 - \$2,500
Betterment - 3164 ⇒ Schwab U.S. Broad Market ETF (SCHB) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment - 3164 ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Betterment - 3164 ⇒ Vanguard Emerging Markets Government Bond ETF (VWOB) [ST]	JT	None	Capital Gains, Dividends	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Betterment - 3164 ⇒ Vanguard FTSE Developed Markets ETF (VEA) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment - 3164 ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Betterment - 3164 ⇒ Vanguard Mid-Cap Value ETF (VOE) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment - 3164 ⇒ Vanguard Short-Term Inflation-Protected Securities Index Fund (VTIP) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Betterment - 3164 ⇒ Vanguard Small-Cap Value ETF (VBR) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Betterment - 3164 ⇒ Vanguard Total International Bond ETF (BNDX) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Betterment - 3164 ⇒ Vanguard Total Stock Market ETF (VTI) [ST]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment - 3164 ⇒ Vanguard Value ETF (VTV) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Betterment - 4754 ⇒ Engine No. 1 Transform 500 ETF (VOTE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment - 4754 ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Betterment - 4754 ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Betterment - 4754 ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment - 4754 ⇒ iShares ESG Aware U.S. Aggregate Bond ETF (EAGG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment - 4754 ⇒ iShares ESG Aware USD Corporate Bond ETF	SP	\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(SUSC) [ST]					
Betterment - 4754 ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Betterment - 4754 ⇒ Vanguard Total International Bond ETF (BNDX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Investment Property [RP]	SP	\$100,001 - \$250,000	None		
LOCATION: New York City / USA, NY, US					
J.P Morgan -3183 [BA]		\$1,001 - \$15,000	Interest	None	\$1 - \$200
J.P. Morgan -0030 Consolidated (Rev Trust) ⇒ J.P. Morgan -0030 Consolidated (Rev Trust) [BA]		\$1 - \$1,000	None		
DESCRIPTION: No activity 2021					
J.P. Morgan -0271 Consolidated ⇒ J.P. Morgan -0271 Consolidated [OT]		\$1,001 - \$15,000	Interest	None	None
DESCRIPTION: <\$1 interest					
J.P. Morgan -0772 Consolidated ⇒ J.P. Morgan -0772 Consolidated [OT]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Checking interest					
J.P. Morgan -3683 [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
J.P. Morgan -4265 Consolidated ⇒ Ishares MSCI World Index Fund (URTH) [ST]	DC	None	Capital Gains	\$15,001 - \$50,000	None
J.P. Morgan -4265 Consolidated ⇒ JPMorgan Deposit Acct [MF]	DC	\$15,001 - \$50,000	None		
J.P. Morgan -4265 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	None
J.P. Morgan -4265 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
J.P. Morgan -4265 Consolidated ⇒	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Health Care ETF (VHT) [ST]					
J.P. Morgan -4265 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
J.P. Morgan -4404 Consolidated ⇒ Ishares MSCI World Index Fund (URTH) [ST]	DC	None	Capital Gains	\$15,001 - \$50,000	None
J.P. Morgan -4404 Consolidated ⇒ JPMorgan Deposit Acct [MF]	DC	\$15,001 - \$50,000	None		
DESCRIPTION: Child 2 JPM					
J.P. Morgan -4404 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	None
J.P. Morgan -4404 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	None
J.P. Morgan -4404 Consolidated ⇒ Vanguard Health Care ETF (VHT) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
J.P. Morgan -4404 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	None
J.P. Morgan -6254 Consolidated ⇒ J.P. Morgan -6254 Consolidated [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
J.P. Morgan -6872 Consolidated ⇒ JPMorgan Deposit Acct [MF]	DC	\$1,001 - \$15,000	None		
DESCRIPTION: Child 3 JPM					
J.P. Morgan -6872 Consolidated ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
J.P. Morgan -6872 Consolidated ⇒ Vanguard Communication Services ETF (VOX) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
J.P. Morgan -6872 Consolidated ⇒ Vanguard Health Care ETF (VHT) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
J.P. Morgan -6872 Consolidated ⇒ Vanguard Information Tech ETF (VGT) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
J.P. Morgan -9941 Consolidated ⇒ J.P. Morgan -9941 Consolidated [OT] DESCRIPTION: No activity 2021	SP	\$1 - \$1,000	None		
J.P. Morgan -B4717 Consolidated (Child 1) ⇒ J.P. Morgan -B4717 Consolidated [OT] DESCRIPTION: Child 1 JP acct	DC	None	Dividends, Interest	None	\$201 - \$1,000
J.P. Morgan -B69230005 (Child 2) ⇒ J.P. Morgan -B69230005 (Child 2) [OT] DESCRIPTION: Child 2 JP acct	DC	None	Dividends, Interest	None	\$201 - \$1,000
JP Morgan Savings 7647 ⇒ JP Morgan Savings [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
TIAA ⇒ 401a ⇒ TIAA-CREF Lifecycle Index 2050 [MF]		\$15,001 - \$50,000	Tax-Deferred		
TIAA ⇒ 403b ⇒ TIAA - CREF Lifestyle Index 2050 [MF]		\$15,001 - \$50,000	Tax-Deferred		
TIAA ⇒ 403b supplemental ⇒ TIAA - CREF Lifestyle Index 2050 [MF]		\$15,001 - \$50,000	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
University of Pittsburgh	Salary	\$98,688.00	\$95,486.00
Kobre & Kim, LLP	Spouse Salary	N/A	\$56,995.00
Kobre & Kim, LLP	Spouse Independent Contractor Earnings	\$311,968.00	\$246,548.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- 401k Kobre & Kim LLP (Owner: SP)
- 401k Weil, Gotshal & Manges Section (Owner: SP)
- 529 Account 1 - Child 1
LOCATION: NY
- 529 Account 1 - Child 2
LOCATION: NY
- 529 Account 2 - Child 2
LOCATION: PA
- 529 Account 2 - Child 1
LOCATION: PA
- 529 Account 2 - Child 3
LOCATION: PA
- Betterment - 0407 (Owner: SP)
- Betterment - 1850
LOCATION: US
- Betterment - 2427
- Betterment - 2999 (Owner: SP)
- Betterment - 3149 (Owner: JT)
LOCATION: US
- Betterment - 3164 (Owner: JT)
LOCATION: US
- Betterment - 4754 (Owner: SP)
- J.P. Morgan -0030 Consolidated (Rev Trust)
LOCATION: US
- J.P. Morgan -0271 Consolidated
LOCATION: US
- J.P. Morgan -0772 Consolidated (Owner: SP)
LOCATION: US
- J.P. Morgan -4265 Consolidated (Owner: DC)
LOCATION: US
DESCRIPTION: Child 1 JPM Consolidated
- J.P. Morgan -4404 Consolidated (Owner: DC)
LOCATION: US
DESCRIPTION: Child 2 JPM Consolidated
- J.P. Morgan -6254 Consolidated (Owner: JT)

LOCATION: US

- o J.P. Morgan -6872 Consolidated (Owner: DC)
LOCATION: US
DESCRIPTION: Child 3 JPM Consolidated
- o J.P. Morgan -9941 Consolidated (Owner: SP)
LOCATION: US
- o J.P. Morgan -B4717 Consolidated (Child 1) (Owner: DC)
LOCATION: US
- o J.P. Morgan -B69230005 (Child 2) (Owner: DC)
LOCATION: US
- o JP Morgan Savings 7647 (Owner: SP)
LOCATION: US
- o TIAA
- o TIAA ⇒ 401a
- o TIAA ⇒ 403b
- o TIAA ⇒ 403b supplemental

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

COMMENTS

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: Christopher Deluzio , 12/21/2021