



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Peter Ohtaki  
**Status:** Congressional Candidate  
**State/District:** CA18

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 01/7/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 DC1 ⇒ Fidelity 529 age-based fund [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
529 DC1 ⇒ TIAA-CREF age-based fund [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		
529 DC2 ⇒ Fidelity 529 age-based fund [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
529 DC2 ⇒ TIAA-CREF age-based fund [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		
529 DC3 ⇒ Fidelity 529 age-based fund [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		
Empower 401K ⇒ State Street [MF]		\$100,001 - \$250,000	Tax-Deferred		
Empower 401K ⇒ Wells Fargo & Company (WFC) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity IRA ⇒	SP	\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Magellan [MF]		\$100,000			
Ohtaki Family Revocable Trust ⇒ Primary residence in Menlo Park, CA [RP]		\$1,000,001 - \$5,000,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Menlo Park, CA, US DESCRIPTION: Primary residence.					
Ohtaki Family Revocable Trust ⇒ Rental property in Menlo Park, CA [RP]		\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	\$50,001 - \$100,000
LOCATION: San Mateo County, CA, US DESCRIPTION: Single family residence					
Schwab IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ DoubleLine bond [MF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒ Invesco dev markets [MF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒ Invesco FTSE RAFI [EF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA ⇒ iShares ETF [EF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒ iShares MSCI EAFE [EF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA ⇒ Money Market Funds [BA]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ Schwab ETFs [EF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒ Target Corporation (TGT) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA ⇒ USAA Income [MF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab IRA ⇒		\$100,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard bond [MF]		\$250,000			
Schwab IRA ⇒ Vanguard equity index [MF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA ⇒ Vanguard ETFs [EF]		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA ⇒ Western Asset bond [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo IRA ⇒ Allspring Index [MF]		\$100,001 - \$250,000	Tax-Deferred		
Wells Fargo IRA ⇒ Apple Inc. (AAPL) [ST]		\$250,001 - \$500,000	Tax-Deferred		
Wells Fargo IRA ⇒ Renaissance IPO [EF]		\$1,001 - \$15,000	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
Wells Fargo Bank	Salary	\$169,647.00	\$160,000.00
Las Lomas Elementary School District	Spouse Salary	\$30,000.00	\$32,000.00
IRA distributions	IRA distribution	\$45,274.00	\$50,000.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	LoanDepot	Sept 2021	Mortgage on principal residence	\$500,001 - \$1,000,000
JT	Rocket Mortgage	December 2020	Mortgage on rental property	\$250,001 - \$500,000
JT	JP Morgan Chase	2020	Credit cards	\$15,001 - \$50,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Citibank	2019	Credit cards	\$15,001 - \$50,000
JT	Bank of American	2019	Credit cards	\$15,001 - \$50,000
JT	Wells Fargo	2020	Credit cards	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Employee	Wells Fargo Bank

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- o 529 DC1 (Owner: DC)  
LOCATION: CA
- o 529 DC2 (Owner: DC)  
LOCATION: CA
- o 529 DC3 (Owner: DC)  
LOCATION: CA
- o Empower 401K  
DESCRIPTION: Wells Fargo 401K plan
- o Fidelity IRA (Owner: SP)  
DESCRIPTION: Rollover IRA
- o Ohtaki Family Revocable Trust
- o Schwab IRA  
DESCRIPTION: Rollover IRA
- o Wells Fargo IRA  
DESCRIPTION: Traditional IRA

## 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:** Peter Ohtaki , 01/7/2022