



# 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:** Amendment Report  
**Filing Year:** 2021  
**Filing Date:** 05/16/2022  
**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		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
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		
Betterment - 2999 ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Vanguard FTSE Developed Markets ETF (VEA) [ST]					
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 ⇒ iShares National Muni Bond ETF (MUB) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
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 ⇒ Vanguard Total Stock Market ETF (VTI) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
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

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
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 (SUSC) [ST]	SP	\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
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]  LOCATION: New York City / USA, NY, US	SP	\$100,001 - \$250,000	None		
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]  DESCRIPTION: No activity 2021		\$1 - \$1,000	None		
J.P. Morgan -0271 Consolidated ⇒ J.P. Morgan -0271 Consolidated [OT]  DESCRIPTION: <\$1 interest		\$1,001 - \$15,000	Interest	None	None
J.P. Morgan -0772 Consolidated ⇒ J.P. Morgan -0772 Consolidated [OT]  DESCRIPTION: Checking interest	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
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 ⇒ Vanguard Health Care ETF (VHT) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
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] DESCRIPTION: Child 2 JPM	DC	\$15,001 - \$50,000	None		
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] DESCRIPTION: Child 3 JPM	DC	\$1,001 - \$15,000	None		
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
The RAND Corporation	Nonemployee Compensation	\$1,000.00	N/A

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

## 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 , 05/16/2022