



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Karina Lipsman  
**Status:** Congressional Candidate  
**State/District:** VA08

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2022  
**Filing Date:** 08/13/2022  
**Period Covered:** 01/01/2021– 05/21/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Barclays Savings Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
PERATON CORP. RETIREMENT SAVINGS PLAN ⇒ FIPFX Fidelity Freedom INX 2050 R [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Brokerage Account ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	None		
Wells Fargo Brokerage Account ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Wells Fargo Brokerage Account ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Wells Fargo Brokerage Account ⇒ BlackRock Capital Investment Corporation (BKCC) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo Brokerage Account ⇒ FVD FIRST TR VALUE LINE ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$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>
Wells Fargo Brokerage Account ⇒ FXZ FIRST TRUST MATERIAL ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Wells Fargo Brokerage Account ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Wells Fargo Brokerage Account ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Wells Fargo Brokerage Account ⇒ JPIN JPMORGAN ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Wells Fargo Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Wells Fargo Brokerage Account ⇒ TriplePoint Venture Growth BDC Corp. (TPVG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Wells Fargo Brokerage Account ⇒ UBVLX UNDISCOVERED MANAGERS [MF]		\$1,001 - \$15,000	None		
Wells Fargo Roth IRA ⇒ FBT FIRST TR ETF NYSE ETF [EF]		\$1,001 - \$15,000	Dividends	None	None
Wells Fargo Roth IRA ⇒ FVD FIRST TR VALUE LINE ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Wells Fargo Roth IRA ⇒ FXZ FIRST TRUST MATERIAL ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Wells Fargo Roth IRA ⇒ INVESCO QQQ TR ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo Roth IRA ⇒ JEPI JPMORGAN EQUITY ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Wells Fargo Traditional IRA ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA ⇒		\$1,001 - \$15,000	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>
BlackRock Capital Investment Corporation (BKCC) [ST]					
Wells Fargo Traditional IRA ⇒ First Trust Materials AlphaDEX Fund (FXZ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA ⇒ First Trust VL Dividend (FVD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA ⇒ JPMorgan Diversified Return International Equity ETF (JPIN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA ⇒ PRFRX T ROWE PRICE FLTG RATE [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA ⇒ TriplePoint Venture Growth BDC Corp. (TPVG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Airbnb, Inc. - Class A (ABNB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ American Tower Corporation (AMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	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>
Wells Fargo Traditional IRA - Large ⇒ BlackRock Capital Investment Corporation (BKCC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Blackstone Mortgage Trust, Inc. (BXMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Block, Inc. Class A Common Stock, (SQ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Boeing Company (BA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Bristol-Myers Squibb Company (BMY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Clear Channel Outdoor Holdings, Inc. (CCO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ CPXIX COHEN & STEERS PFD [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ CrowdStrike Holdings, Inc. - Class A (CRWD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Deutsche Bank AG (DB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ EEIIX EATON VANCE EMERGING [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ FedEx Corporation (FDX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ First Trust VL Dividend (FVD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Ford Motor Company (F) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ FXZ First Trust Material ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒		\$1,001 - \$15,000	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>
GBOSX JPMORGAN TR I [MF]					
Wells Fargo Traditional IRA - Large ⇒ General Motors Company (GM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ GLNCY GLENCORE PLC [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Goldman Sachs Group, Inc. (GS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ GOOGL ALPHABET INC [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ HubSpot, Inc. (HUBS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ International Business Machines Corporation (IBM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ JD.com, Inc. - American Depositary Shares (JD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ JPIN JPMORGAN ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ LMCLX TRUST FOR ADVISED PORT [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Lowe's Companies, Inc. (LOW) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Lyft, Inc. - Class A (LYFT) [ST]		\$1,001 - \$15,000	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>
Wells Fargo Traditional IRA - Large ⇒ Meta Platforms, Inc. - Class A (FB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Netflix, Inc. (NFLX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ NVIDIA Corporation (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Palantir Technologies Inc. Class A (PLTR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Paramount Global - Class B (PARA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ PRFRX T ROWE PRICE FLTG RATE [MF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ QQQ INVESCO TR ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ RH (RH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Roku, Inc. - Class A (ROKU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Salesforce, Inc. (CRM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ ServiceNow, Inc. (NOW) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ STISX FEDERATED HERMES [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wells Fargo Traditional IRA - Large ⇒ Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Teladoc Health, Inc. (TDOC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Tesla, Inc. (TSLA) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Tractor Supply Company (TSCO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ TriplePoint Venture Growth BDC Corp. (TPVG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ Twilio Inc. Class A (TWLO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Wells Fargo Traditional IRA - Large ⇒ UBVLX UNDISCOVERED MANAGERS [MF]		\$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
Peraton Inc.	Salary	\$18,262.35	\$144,719.93

## 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

- PERATON CORP. RETIREMENT SAVINGS PLAN
- Wells Fargo Brokerage Account  
LOCATION: US
- Wells Fargo Roth IRA
- Wells Fargo Traditional IRA
- Wells Fargo Traditional IRA - Large

## 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:** Karina Lipsman , 08/13/2022