



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Lisa Bartlett
Status: Congressional Candidate
State/District: CA49

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 05/10/2022
Period Covered: 01/01/2021– 05/8/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
County of Orange Defined Contribution Plans ⇒ 401(a) Defined Contribution Plan [OT] DESCRIPTION: 401(a) Plan		\$15,001 - \$50,000	Tax-Deferred		
County of Orange Defined Contribution Plans ⇒ 401(a) Plan [OT] DESCRIPTION: 401(a) Plan		\$100,001 - \$250,000	Tax-Deferred		
County of Orange Defined Contribution Plans ⇒ 457 Defined Contribution Plan [OT] DESCRIPTION: 457 Plan		\$15,001 - \$50,000	Tax-Deferred		
County of Orange Defined Contribution Plans ⇒ 457 Defined Contribution Program [OT] DESCRIPTION: Plan 1		\$100,001 - \$250,000	Tax-Deferred		
Financial Assets ⇒ Cash Balances - Citibank [OT]		\$250,001 - \$500,000	Interest	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Cash Balances					
Raymond James IRA ⇒ Lisa Bartlett- IRA [OT]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Personal IRA					
Raymond James Stock Account ⇒ Personal [OT]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Personal					

* 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
County of Orange	County Supervisor	\$62,572.34	\$180,764.53
Orange County Transportation Authority	Director	\$1,100.00	\$5,021.96
South Coast Air Quality Management District	Director	N/A	\$5,200.00
Orange County Local Agency Formation Commission	Commissioner	\$300.00	\$900.00
Orange County Fire Authority	Director	\$200.00	\$832.50
Foothill Eastern Transportation Corridor Agency	Director	\$1,860.00	\$4,560.00
San Joaquin Hills Transportation Corridor Agency	Director	\$240.00	\$2,880.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
County Supervisor	County of Orange
Director	Orange County Transportation Authority
Commissioner	Orange County Local Agency Formation Commission
Director	Orange County Fire Authority
Director	South Coast Air Quality Management District

Position	Name of Organization
Director	Foothill Eastern Transportation Corridor Agency
Director	San Joaquin Hills Transportation Corridor Agency
Director	CalOptima

SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Tianxiang Zhou and Regina Leu (Irvine, CA, CA, US)	Real estate client representation -Residential property sale

SCHEDULE A ASSET CLASS DETAILS

- County of Orange Defined Contribution Plans
DESCRIPTION: 457 Defined Contribution Program- Employee
- County of Orange Defined Contribution Plans
DESCRIPTION: 401(a) Plan- Employer
- County of Orange Defined Contribution Plans
DESCRIPTION: 457 Defined Contribution Plan-Employee
- County of Orange Defined Contribution Plans
DESCRIPTION: 401(a) Defined Contribution Plan- Employer
- Financial Assets
LOCATION: US
- Raymond James IRA
DESCRIPTION: Individual retirement account
- Raymond James Stock Account
LOCATION: US
DESCRIPTION: Individual investment account

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: Lisa Bartlett , 05/10/2022