



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Jill Naomi Tokuda  
**Status:** Congressional Candidate  
**State/District:** HI02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2022  
**Filing Date:** 06/27/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
First Hawaiian Bank Checking Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
First Hawaiian Bank Checking-Kalliope LLC [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
First Hawaiian Bank Savings Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
First Hawaiian Bank Savings-Kalliope LLC [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Howard Hughes 401K Plan [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Fidelity 500 Index Fund					
Raymond James Roth IRA [MF]		\$50,001 - \$100,000	None		
DESCRIPTION: Capital World Growth and Income Fund					
Raymond James SEP IRA [IH]		\$100,001 - \$250,000	None		

\* 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
Howard Hughes Corporation	Spouse Salary	N/A	N/A
Hawaii Employees Retirement System	Pension	\$13,131.30	\$30,863.52
Kalliope, LLC	Single Member LLC	\$52,654.44	\$290,143.00

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Barclays COMMENTS: to be paid off by 7/1/22	May 2022	Credit Card	\$15,001 - \$50,000
	First Hawaiian Bank COMMENTS: Paid off	May 2022	Credit Card	\$10,000 - \$15,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
President & Owner (compensated)	Kalliope, LLC
Board Member (uncompensated)	Hawaii Data Collaborative
Advisory Board Member (uncompensated)	Hawaii Budget and Policy Center
Executive Director (2020: compensated)	Nisei Veterans Memorial Center
External Director (uncompensated)	Nisei Veterans Memorial Center
Board Member (2019-2020: uncompensated)	Patsy T. Mink Political Action Committee

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
November 2018	Hawaii Employer-Union Health Benefits Trust Fund	Retiree health benefits
November 2018	Hawaii Employees Retirement System	Pension

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

Source (Name and Address)	Brief Description of Duties
Kaimana Hila (Honolulu, HI, US)	Kalliope LLC-Program Development & Execution
CyberHawaii (Honolulu, HI, US)	Kalliope LLC-Program Development & Management
Hawaii Community Foundation (Daniel K Inouye Institute) (Honolulu, HI, US)	Kalliope LLC-Program Development & Execution
Hawaii Farm Bureau Foundation (Honolulu, HI, US)	Kalliope LLC-Program Development & Execution
Harold KL Castle Foundation (Kailua, HI, US)	Kalliope LLC-Program Development & Management
Ohana Holdings (Honolulu, HI, US)	Kalliope LLC-Strategic Advisor & Program Development
Nisei Veterans Memorial Center (Kahului, HI, US)	Kalliope LLC-Capital Campaign

## 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:** Jill Naomi Tokuda , 06/27/2022