



Filing ID #10052524

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Seth Moulton  
**Status:** Member  
**State/District:** MA06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 05/7/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
"Called to Serve: Learning to Lead in War and Peace," St. Martin's Press [OT] DESCRIPTION: The value of this asset is unascertainable. This is a book contract.		Undetermined	Royalties	None	<input type="checkbox"/>
Daughter's 529 ⇒ MA Portfolio 2036 (Fidelity Index) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
ETRADE Investment Account ⇒ Activision Blizzard, Inc (ATVI) [ST]	SP	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
ETRADE Investment Account ⇒ Activision Blizzard, Inc (ATVI) [ST] DESCRIPTION: Unvested stock	SP	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
ETRADE Investment Account ⇒ Amazon.com, Inc. (AMZN) [ST]	SP	\$1 - \$1,000	None		<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Global Leaders Inst. (BAFLX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small Cap Fund Value Inst. (BAUUX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small Cap Growth Instl (BAFSX) [MF]	JT	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Sustainable Growth Inst. (BAFWX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax Exempt Sustain BD INV (BITEX) [MF]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Lazard Global Listed Infrastructure Instl (GLIFX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Parnassus Core Equity Fund - Institutional Shares (PRILX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Vanguard Dividend Growth Investor CL (VDIGX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Vanguard Short Term Treasury ETF (VGSH) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Artisan INTL Value Fund INSTL (APHKX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Emerging Markets Select Instl (BAFQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Global Leaders Inst. (BAFLX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Small Cap Fund Value Inst. (BAUUX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Small Cap Growth Instl (BAFSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brown Advisory Sustainable Growth Inst. (BAFWX) [MF]					
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Total Return Class Inst. (BAFTX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Parnassus Core Equity Fund - Institutional Shares (PRILX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Dividend Growth Investor CL (VDIGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Short Term Bond Index Admiral (VBIRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Emerging Markets Select Instl (BAFQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Global Leaders Inst. (BAFLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Small Cap Fund Value Inst. (BAUUX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Small Cap Growth Instl (BAFSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Sustainable Growth Inst. (BAFWX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Total Return Class Inst. (BAFTX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Vanguard Dividend Growth Investor CL (VDIGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Global Leaders Inst. (BAFLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Small Cap Growth Instl (BAFSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Growth Inst. (BAFWX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Marblehead Bank account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Niece's 529 Account ⇒ American Funds College 2033 Fund Class 529-A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Oura Health OY Series C Preferred Shares [PS]  DESCRIPTION: Health technology company. Oulu, Finland.	JT	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Residential property located in Salem, MA [RP]  LOCATION: Salem, MA, US	JT	\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ American Funds 2050 Target Date Retirement Fund Class A (AATX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Artisan INTL Value Fund INSTL (APHKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Emerging Markets Select Instl (BAFQX) [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Global Leaders Inst. (BAFLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Small Cap Fund Value Inst. (BAUUX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Small Cap Growth Instl (BAFSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Sustainable Growth Inst. (BAFWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Total Return Class Inst. (BAFTX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Vanguard Dividend Growth Investor CL (VDIGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Artisan INTL Value Fund INSTL (APHKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Emerging Markets Select Instl (BAFQX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Global Leaders Inst. (BAFLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Small Cap Fund Value Inst. (BAUUX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Small Cap Growth Instl (BAFSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Growth Inst. (BAFWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Total Return Class Inst. (BAFTX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Parnassus Core Equity Fund - Institutional Shares (PRILX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Seth: Fidelity Investments Roth IRA ⇒ Vanguard Dividend Growth Investor CL (VDIGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Thea's 529 ⇒ NH Portfolio 2030 (Fidelity Funds) [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
USAA accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
ETRADE Investment Account ⇒ Activision Blizzard, Inc (ATVI) [ST]	SP	09/16/2022	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
ETRADE Investment Account ⇒ Amazon.com, Inc. (AMZN) [ST]	SP	08/8/2022	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Artisan INTL Value Fund INSTL (APHKX) [MF]	JT	05/25/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Artisan INTL Value Fund INSTL (APHKX) [MF]	JT	09/30/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Emerging Markets Select Instl (BAFQX) [MF]	JT	05/25/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Emerging Markets Select Instl (BAFQX) [MF]	JT	09/30/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Global Leaders Inst. (BAFLX) [MF]	JT	05/25/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Global Leaders Inst. (BAFLX) [MF]	JT	09/30/2022	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small Cap Fund Value Inst. (BAUUX) [MF]	JT	05/25/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small Cap Growth Instl (BAFSX) [MF]	JT	05/25/2022	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Sustainable Growth Inst. (BAFWX) [MF]	JT	05/25/2022	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax Exempt Bond INSTL (BTEIX) [MF]	JT	05/25/2022	P	\$15,001 - \$50,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax Exempt Bond INSTL (BTEIX) [MF]	JT	06/27/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax Exempt Sustain BD INV (BITEIX) [MF]	JT	01/26/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax Exempt Sustain BD INV (BITEIX) [MF]	JT	05/25/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax Exempt Sustain BD INV (BITEIX) [MF]	JT	06/27/2022	P	\$15,001 - \$50,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax Exempt Sustain BD INV (BITEIX) [MF]	JT	09/30/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	09/30/2022	P	\$15,001 - \$50,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	10/3/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	01/26/2022	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Lazard Global Listed Infrastructure Instl (GLIFX) [MF]	JT	09/30/2022	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Parnassus Core Equity Fund - Institutional Shares (PRILX) [MF]	JT	05/25/2022	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Vanguard Dividend Growth Investor CL (VDIGX) [MF]	JT	05/25/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Investments Transfer of Death Account ⇒ Vanguard Short Term Treasury ETF (VGSH) [EF]	JT	10/3/2022	P	\$15,001 - \$50,000	
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Small Cap Fund Value Inst. (BAUUX) [MF]	SP	12/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Small Cap Growth Instl (BAFSX) [MF]	SP	12/28/2022	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Growth Inst. (BAFWX) [MF]	SP	12/28/2022	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Government Money Market Fund Cash Reserves (FDRXX) [MF]	SP	12/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Parnassus Core Equity Fund - Institutional Shares (PRILX) [MF]	SP	11/17/2022	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Rollover IRA ⇒ American Funds 2050 Target Date Retirement Fund Class A (AATX) [MF]		05/25/2022	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Global Leaders Inst. (BAFLX) [MF]		05/25/2022	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Sustainable Growth Inst. (BAFWX) [MF]		05/25/2022	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Total Return Class Inst. (BAFTX) [MF]		05/25/2022	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Rollover IRA ⇒ Vanguard Dividend Growth Investor CL (VDIGX) [MF]		05/25/2022	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Roth IRA ⇒ Artisan INTL Value Fund INSTL (APHKX) [MF]		12/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Emerging Markets Select Instl (BAFQX) [MF]		12/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Global Leaders Inst. (BAFLX) [MF]		12/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Small Cap Fund Value Inst. (BAUUX) [MF]		12/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Small Cap Growth Instl (BAFSX) [MF]		12/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Growth Inst. (BAFWX) [MF]		12/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Total Return Class Inst. (BAFTX) [MF]		12/28/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		12/28/2022	P	\$15,001 - \$50,000	
Seth: Fidelity Investments Roth IRA ⇒ Parnassus Core Equity Fund - Institutional Shares (PRILX) [MF]		12/28/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Vanguard Dividend Growth Investor CL (VDIGX) [MF]		12/28/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

\* 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
Activision	Spouse salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Marblehead Bank	February 2022	Home equity line of credit	\$250,001 - \$500,000
JT	Marblehead Bank	April 2020	Personal residence mortgage	\$1,000,001 - \$5,000,000
JT	Chase Bank	December 2022	Credit card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Salem YMCA
COMMENTS: Service ended on June 30, 2022.	

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
J Street Education Fund	02/20/2022	02/24/2022	Munich, Germany - Tel Aviv, Israel - Boston, Massachusetts	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Schmidt Futures	07/14/2022	07/17/2022	Boston, Massachusetts - Bozeman, Montana - Boston, Massachusetts	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>Daughter's 529 (Owner: SP) LOCATION: MA</li><li>ETRADE Investment Account (Owner: SP) LOCATION: US</li><li>Fidelity Investments Transfer of Death Account (Owner: JT) LOCATION: US DESCRIPTION: Assets previously disclosed under asset class name "Liz: Transfer on Death Account"</li><li>Liz: Fidelity Investments IRA#1 (Owner: SP) DESCRIPTION: Assets previously disclosed under the asset class name "Liz: Eagle Fund IRA"</li><li>Liz: Fidelity Investments IRA#2 (Owner: SP) DESCRIPTION: Assets previously disclosed under asset class name "Liz: Eagle Fund IRA"</li><li>Liz: Fidelity Investments Roth IRA (Owner: SP)</li></ul>
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DESCRIPTION: Assets previously disclosed under asset class name "Liz: American Funds Roth IRA"

- Niece's 529 Account

LOCATION: MA

- Seth: Fidelity Investments Rollover IRA

DESCRIPTION: Assets previously disclosed under asset class name "Seth: American Funds IRA"

- Seth: Fidelity Investments Roth IRA

DESCRIPTION: Assets previously disclosed under asset class name "Seth: Eagle Strategies Roth IRA"

- Thea's 529 (Owner: SP)

LOCATION: NY

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**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:** Hon. Seth Moulton , 05/7/2023