



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Lauren Underwood  
**Status:** Member  
**State/District:** IL14

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 05/15/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alliant Credit Union [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DuPage Credit Union [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Health Savings Account ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Health Savings Account ⇒ Fidelity US Sustainability Fund (FITLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity Health Savings Account ⇒ Nuveen Winslow Large Cap Growth ESG CL A (NWCAX) [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Investment ⇒ Vanguard 500 Index Fund (VFIAX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Government Printing Office Federal Credit Union [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard Roth IRA ⇒ Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Roth IRA ⇒ Vanguard Target Retirement 2070 Fund (VSVNX) [MF]		\$1 - \$1,000	Tax-Deferred		<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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Health Savings Account ⇒ Fidelity US Sustainability Fund (FITLX) [MF]		04/25/2022	P	\$1,001 - \$15,000	
Vanguard Roth IRA ⇒ Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF]		08/8/2022	P	\$1,001 - \$15,000	
Vanguard Roth IRA ⇒ Vanguard Target Retirement 2070 Fund (VSVNX) [MF]		11/11/2022	P	\$1,001 - \$15,000	

\* 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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Freedom Mortgage	December 2020	Mortgage on personal residence	\$250,001 - \$500,000
COMMENTS: Mortgage sold by Arvest Central Mortgage Company to Freedom Mortgage in 2022.				

## SCHEDULE E: POSITIONS

Position	Name of Organization
Commission Member	The CSIS Commission on Strengthening America's Health Security

## 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	02/18/2022	02/25/2022	Chicago, IL - Tel Aviv, Israel - Chicago, IL	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

Source	Activity	Date	Amount	Charity Name
Society of OB/GYN Hospitalists (SOGH)	Speech	09/12/2022	\$1,000.00	
University of Michigan, School of Nursing	Speech	04/30/2022	\$500.00	

## SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>o Fidelity Health Savings Account LOCATION: US</li><li>o Fidelity Investment LOCATION: US</li><li>o Vanguard Roth IRA</li></ul>
---

## 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. Lauren Underwood , 05/15/2023