Filing ID #10052984

Financial Disclosure Report

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

Filer Information

Name: Hon. Kim Dr Schrier

Status: Member

State/District: WA08

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?
David's IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	$50,001 - $100,000	Tax-Deferred		✓
David's IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	$15,001 - $50,000	Tax-Deferred		✓
David's IRA ⇒ Money Market [BA]	SP	$1,001 - $15,000	Tax-Deferred		
David's IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	SP	$500,001 - $1,000,000	Tax-Deferred		✓
David's IRA ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	SP	$15,001 - $50,000	Tax-Deferred		✓
David's IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	SP	$50,001 - $100,000	Tax-Deferred		✓
David's IRA ⇒ Vanguard Scottsdale FDS Intermediate (VCIT) [EF]	SP	None	Tax-Deferred		✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
David's IRA ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	SP	$50,001 - $100,000	Tax-Deferred		✓
Gowing Family Trust Primary Account ⇒ Apple Inc. (AAPL) [ST]	JT	None	Capital Gains, Dividends	$50,001 - $100,000	✓
Gowing Family Trust Primary Account ⇒ Dimensional Fund Advisors US Social Core EQTY 2 (DFUEX) [MF] Description: sold for a loss	JT	None	None		✓
Gowing Family Trust Primary Account ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF]	JT	None	Capital Gains	$201 - $1,000	✓
Gowing Family Trust Primary Account ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF] Description: sold for a loss	JT	None	None		✓
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF] Description: sold for a loss	JT	None	None		✓
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF] Description: purchased & sold in 2022 for loss	JT	None	None		✓
Gowing Family Trust Primary Account ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF] Description: sold for a loss	JT	None	None		✓
Gowing Family Trust Primary Account ⇒ iShares ESG MSCI USA Leaders ETF (SUSL) [EF] Description: transferred to the Gowing Schrier Qualified Blind Trust in 2022	JT	None	None		✓
Gowing Family Trust Primary Account ⇒ IShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF] Description: transferred to the Gowing Schrier Qualified Blind Trust in 2022	JT	None	None		✓
Gowing Family Trust Primary Account ⇒ Nuveen ESG International Developed Markets Equity ETF (NUDM) [EF] Description: transferred to the Gowing Schrier Qualified Blind Trust in 2022	JT	None	None		✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Gowing Family Trust Primary Account ⇒ Nuveen ESG Small-Cap ETF (NUSC) [EF] DESCRIPTION: transferred to the Gowing Schrier Qualified Blind Trust in 2022.	JT	None	None		☑
Gowing Family Trust Primary Account ⇒ Schwab U.S. REIT ETF (SCHH) [EF] DESCRIPTION: transferred to the Gowing Schrier Qualified Blind Trust in 2022	JT	None	None		☑
Gowing Family Trust Primary Account ⇒ Tesla, Inc. (TSLA) [ST]	JT	None	Capital Gains	$100,001 - $1,000,000	☑
Gowing Family Trust Primary Account ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF] DESCRIPTION: sold for a loss	JT	None	None		☑
Gowing Family Trust Primary Account ⇒ Vanguard ESG US Stock (ESGV) [EF] DESCRIPTION: transferred to the Gowing Schrier Qualified Blind Trust in 2022	JT	None	None		☑
Gowing Family Trust Primary Account ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF] DESCRIPTION: sold for a loss	JT	None	None		☑
Gowing Family Trust Primary Account ⇒ Vanguard Real Estate ETF (VNQ) [EF] DESCRIPTION: transferred to the Gowing Schrier Qualified Blind Trust in 2022	JT	None	None		☑
Gowing Family Trust Primary Account ⇒ Vanguard Total BND MRKT ETF (BND) [EF] DESCRIPTION: sold for a loss	JT	None	None		☑
Gowing Family Trust Primary Account ⇒ Vanguard World Funds ETF (VCEB) [EF] DESCRIPTION: transferred to the Gowing Schrier Qualified Blind Trust in 2022	JT	None	Dividends	$201 - $1,000	☑
Inherited IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	JT	$50,001 - $100,000	Tax-Deferred		☑
Inherited IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	JT	$1,001 - $15,000	Tax-Deferred		☑
Inherited IRA ⇒	JT	$1,001 - $15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
T.D Ameritrade - Cash [BA]					
Inherited IRA ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]	JT	$50,001 - $100,000	Tax-Deferred		✓
Inherited IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	JT	$100,001 - $250,000	Tax-Deferred		✓
Inherited IRA ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	JT	$1,001 - $15,000	Tax-Deferred		✓
Inherited IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	$1,001 - $15,000	Tax-Deferred		✓
Inherited IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	JT	$15,001 - $50,000	Tax-Deferred		✓
Kim's 401(a) with VMMC ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]		$1,001 - $15,000	Tax-Deferred		
Kim's 401(a) with VMMC ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		$1 - $1,000	Tax-Deferred		
Kim's 401(a) with VMMC ⇒ IShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]		$50,001 - $100,000	Tax-Deferred		
Kim's 401(a) with VMMC ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		$100,001 - $250,000	Tax-Deferred		✓
Kim's 401(a) with VMMC ⇒ Vanguard ESG US Stock (ESGV) [EF]		$50,001 - $100,000	Tax-Deferred		
Kim's 401(a) with VMMC ⇒ Vanguard Scottsdale FDS Intermediate (VCIT) [EF]		$1 - $1,000	Tax-Deferred		
Kim's 403b - Pre-2009 ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		$100,001 - $250,000	Tax-Deferred		✓
Kim's 403b - Pre-2009 ⇒ Fidelity International Index (FSPSX) [MF]		$100,001 - $250,000	Tax-Deferred		
Kim's 403b - Pre-2009 ⇒		$50,001 -	Tax-Deferred		✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity US Bond Index (FXNAX) [MF]		$100,000			
Kim's 403b with VMMC ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]		$1 - $1,000	Tax-Deferred		☐
Kim's 403b with VMMC ⇒ Vanguard 500 Index Adm (VFIAX) [MF]		$100,001 - $250,000	Tax-Deferred		☑
Kim's 403b with VMMC ⇒ Vanguard Developed Markets Index Admiral (VTMGX) [MF]		$50,001 - $100,000	Tax-Deferred		☑
Kim's 403b with VMMC ⇒ VANGUARD INTERMED TRM INVST GR ADMIRAL (VFIDX) [MF]		$15,001 - $50,000	Tax-Deferred		☐
Kim's 403b with VMMC ⇒ VANGUARD MID-CAP VALUE INDEX ADMIRAL (VMMAX) [MF]		None	Tax-Deferred		☑
Kim's 403b with VMMC ⇒ Vanguard Small Cap Growth Index Adm (VSGAX) [MF]		$50,001 - $100,000	Tax-Deferred		☑
Kim's Roth IRA - 2014 ⇒ iShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]		$50,001 - $100,000	Tax-Deferred		☑
Kim's Roth IRA - 2014 ⇒ Money Market [BA]		$1,001 - $15,000	Tax-Deferred		☐
Kim's Roth IRA - 2014 ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		$15,001 - $50,000	Tax-Deferred		☐
Samuel Gowing Trust ⇒ Dimensional Fund Advisors US Social Core EQTY (DSCLX) [EF]		$50,001 - $100,000	Dividends	$1,001 - $2,500	☐
Samuel Gowing Trust ⇒ FDIC Insured Deposit Account [BA]		$1,001 - $15,000	None		☐
Samuel Gowing Trust ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		$1,001 - $15,000	None		☑
Samuel Gowing Trust ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC)		$1,001 - $15,000	Dividends	$1 - $200	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
[EF]					
Samuel Gowing Trust ⇒ iShares Trust ESG Aware MSCI USA Small Cap (ESML) [EF]		$15,001 - $50,000	Dividends	$201 - $1,000	☐
Samuel Gowing Trust ⇒ SPDR Portfolio Aggregate Bond ETF (SPAB) [EF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Samuel Gowing Trust ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		$15,001 - $50,000	Dividends	$201 - $1,000	☑
Samuel Gowing Trust ⇒ Vanguard ESG US Stock (ESGV) [EF]		$50,001 - $100,000	Dividends	$1,001 - $2,500	☑
Samuel Gowing Trust ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Samuel Gowing Trust ⇒ Vanguard Real Estate ETF (VNQ) [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	☐
Stanford Health Care Retirement Savings Plan ⇒ Fidelity Freedom Index 2030 Fund (FFEGX) [IH] DESCRIPTION: previously reported as Vanguard Institutional Target Retirement 2030 (FFEGX)	JT	$1,001 - $15,000	Tax-Deferred		☐
The Gowing Schrier Qualified Blind Trust [EQ]	JT	$5,000,001 - $25,000,000	QBT Income	$50,001 - $100,000	☐
Wells Fargo joint checking account 2018 [BA] DESCRIPTION: Joint checking account with my spouse.	JT	$50,001 - $100,000	None		☐

* 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?
David's IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	01/19/2022	P	$1,001 - $15,000	
David's IRA ⇒	SP	04/4/2022	P	$100,001 -	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]				$250,000	
David's IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	04/4/2022	P	$15,001 - $50,000	
David's IRA ⇒ iShares Trust 3 7 Year Treasury Bond (IEI) [EF]	SP	04/4/2022	S	$100,001 - $250,000	☐
David's IRA ⇒ Tesla, Inc. (TSLA) [ST]	SP	03/22/2022	S	$250,001 - $500,000	☐
David's IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	SP	04/4/2022	P	$500,001 - $1,000,000	
David's IRA ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	SP	04/4/2022	P	$15,001 - $50,000	
David's IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	SP	04/4/2022	S (partial)	$100,001 - $250,000	☐
David's IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	SP	04/26/2022	P	$1,001 - $15,000	
David's IRA ⇒ Vanguard Scottsdale FDS Intermediate (VCIT) [EF]	SP	04/4/2022	S	$100,001 - $250,000	☐
David's IRA ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	SP	04/4/2022	S (partial)	$1,001 - $15,000	☐
David's IRA ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	SP	07/11/2022	P	$1,001 - $15,000	
David's IRA ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	SP	11/22/2022	P	$1,001 - $15,000	
Gowing Family Trust Primary Account ⇒ Apple Inc. (AAPL) [ST]	JT	03/22/2022	S	$500,001 - $1,000,000	☑
Description: Background Information: The holdings of Gowing Family Trust Secondary account were consolidated into the Primary account in December, 2021. As a result, the Primary account held AAPL stock since that time in December until this reported sale. (i.e., Prior to that, the AAPL stock was in the Secondary account.)					
Gowing Family Trust Primary Account ⇒ Dimensional Fund Advisors US Social Core EQTY 2 (DFUEX)	JT	09/21/2022	S	$250,001 - $500,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
[MF]					
Gowing Family Trust Primary Account ⇒ Dimensional Fund Advisors US Social Core EQTY 2 (DFUEX) [MF]	JT	03/30/2022	P	$1,001 - $15,000	
Gowing Family Trust Primary Account ⇒ Dimensional Fund Advisors US Social Core EQTY 2 (DFUEX) [MF]	JT	06/29/2022	P	$1,001 - $15,000	
Gowing Family Trust Primary Account ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF]	JT	05/23/2022	S	$50,001 - $100,000	☑
Gowing Family Trust Primary Account ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF]	JT	05/5/2022	P	$50,001 - $100,000	
Gowing Family Trust Primary Account ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]	JT	02/16/2022	S (partial)	$250,001 - $500,000	☐
Gowing Family Trust Primary Account ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]	JT	05/23/2023	S	$250,001 - $500,000	☐
Gowing Family Trust Primary Account ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]	JT	04/18/2022	P	$250,001 - $500,000	
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	JT	02/16/2022	S (partial)	$500,001 - $1,000,000	☐
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	JT	06/14/2022	S (partial)	$1,000,001 - $5,000,000	☐
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	JT	09/21/2022	S	$1,000,001 - $5,000,000	☐
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	JT	04/18/2022	P	$1,000,001 - $5,000,000	
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	JT	05/11/2022	P	$100,001 - $250,000	
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	JT	08/30/2022	P	$1,000,001 - $5,000,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	JT	07/26/2022	S	$500,001 - $1,000,000	☐
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	JT	05/11/2022	P	$100,001 - $250,000	
Gowing Family Trust Primary Account ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]	JT	05/23/2022	P	$250,001 - $500,000	
Gowing Family Trust Primary Account ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	JT	09/21/2022	S	$100,001 - $250,000	☐
Gowing Family Trust Primary Account ⇒ iShares ESG MSCI USA Leaders ETF (SUSL) [EF]	JT	05/11/2022	S (partial)	$100,001 - $250,000	☐
Gowing Family Trust Primary Account ⇒ iShares ESG MSCI USA Leaders ETF (SUSL) [EF]	JT	05/5/2022	P	$250,001 - $500,000	
Gowing Family Trust Primary Account ⇒ iShares ESG MSCI USA Leaders ETF (SUSL) [EF]	JT	06/14/2022	P	$1,000,001 - $5,000,000	
Gowing Family Trust Primary Account ⇒ iShares ESG MSCI USA Leaders ETF (SUSL) [EF]	JT	09/21/2022	P	$1,000,001 - $5,000,000	
Gowing Family Trust Primary Account ⇒ IShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]	JT	02/16/2022	S (partial)	$500,001 - $1,000,000	☐
Gowing Family Trust Primary Account ⇒ IShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]	JT	06/22/2022	S (partial)	$500,001 - $1,000,000	☐
Gowing Family Trust Primary Account ⇒ IShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]	JT	04/18/2022	P	$500,001 - $1,000,000	
Gowing Family Trust Primary Account ⇒ IShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]	JT	04/26/2022	P	$1,001 - $15,000	
Gowing Family Trust Primary Account ⇒ IShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]	JT	05/17/2022	P	$1,001 - $15,000	
Gowing Family Trust Primary Account ⇒ Nuveen ESG International Developed Markets Equity ETF (NUDM) [EF]	JT	09/21/2022	P	$1,000,001 - $5,000,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Gowing Family Trust Primary Account ⇒ Nuveen ESG Small-Cap ETF (NUSC) [EF]	JT	04/18/2022	S	$500,001 - $1,000,000	☐
Gowing Family Trust Primary Account ⇒ Nuveen ESG Small-Cap ETF (NUSC) [EF]	JT	02/16/2022	P	$1,000,001 - $5,000,000	
Gowing Family Trust Primary Account ⇒ Nuveen ESG Small-Cap ETF (NUSC) [EF]	JT	06/22/2022	P	$500,001 - $1,000,000	
Gowing Family Trust Primary Account ⇒ Schwab U.S. REIT ETF (SCHH) [EF]	JT	05/11/2022	S (partial)	$100,001 - $250,000	☐
Gowing Family Trust Primary Account ⇒ Schwab U.S. REIT ETF (SCHH) [EF]	JT	02/16/2022	P	$100,001 - $250,000	
Gowing Family Trust Primary Account ⇒ Schwab U.S. REIT ETF (SCHH) [EF]	JT	06/14/2022	P	$100,001 - $250,000	
Gowing Family Trust Primary Account ⇒ Tesla, Inc. (TSLA) [ST]	JT	03/22/2022	S	$250,001 - $500,000	☑
DESCRIPTION: Background Information: The holdings of Gowing Family Trust Secondary account were consolidated into the Primary account in December, 2021. As a result, the Primary account held Tesla stock since that time in December until this reported sale. (i.e., Prior to that, the TSLA stock was in the Secondary account.)					
Gowing Family Trust Primary Account ⇒ Vangard ESG INTL STK ETF (VSGX) [EF]	JT	04/18/2022	S (partial)	$1,000,001 - $5,000,000	☐
Gowing Family Trust Primary Account ⇒ Vangard ESG INTL STK ETF (VSGX) [EF]	JT	05/11/2022	S (partial)	$100,001 - $250,000	☐
Gowing Family Trust Primary Account ⇒ Vangard ESG INTL STK ETF (VSGX) [EF]	JT	08/30/2022	S	$1,000,001 - $5,000,000	☐
Gowing Family Trust Primary Account ⇒ Vangard ESG INTL STK ETF (VSGX) [EF]	JT	06/14/2022	P	$1,000,001 - $5,000,000	
Gowing Family Trust Primary Account ⇒ Vangard ESG INTL STK ETF (VSGX) [EF]	JT	06/28/2022	P	$15,001 - $50,000	
Gowing Family Trust Primary Account ⇒ Vanguard ESG US Stock (ESGV) [EF]	JT	05/5/2022	S (partial)	$250,001 - $500,000	☐
Gowing Family Trust Primary Account ⇒	JT	06/14/2022	S	$1,000,001 -	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Vanguard ESG US Stock (ESGV) [EF]			(partial)	$5,000,000	
Gowing Family Trust Primary Account ⇒ Vanguard ESG US Stock (ESGV) [EF]	JT	09/21/2022	S (partial)	$500,001 - $1,000,000	
Gowing Family Trust Primary Account ⇒ Vanguard ESG US Stock (ESGV) [EF]	JT	04/4/2022	P	$250,001 - $500,000	
Gowing Family Trust Primary Account ⇒ Vanguard ESG US Stock (ESGV) [EF]	JT	04/26/2022	P	$1,001 - $15,000	
Gowing Family Trust Primary Account ⇒ Vanguard ESG US Stock (ESGV) [EF]	JT	07/26/2022	P	$500,001 - $1,000,000	
Gowing Family Trust Primary Account ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	JT	05/5/2022	S	$50,001 - $100,000	
Gowing Family Trust Primary Account ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	02/16/2022	S (partial)	$100,001 - $250,000	
Gowing Family Trust Primary Account ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	06/14/2022	S (partial)	$100,001 - $250,000	
Gowing Family Trust Primary Account ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	05/11/2022	P	$100,001 - $250,000	
Gowing Family Trust Primary Account ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	JT	04/18/2022	S	$250,001 - $500,000	
Gowing Family Trust Primary Account ⇒ Vanguard Total BND MRKT ETF (BND) [EF]	JT	02/16/2022	P	$250,001 - $500,000	
Gowing Family Trust Primary Account ⇒ Vanguard World Funds ETF (VCEB) [EF]	JT	09/21/2022	P	$50,001 - $100,000	
Inherited IRA ⇒ Apple Inc. (AAPL) [ST]	JT	03/22/2022	S	$250,001 - $500,000	
Inherited IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	JT	02/14/2022	P	$50,001 - $100,000	
Inherited IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	JT	04/26/2022	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Inherited IRA ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]	JT	04/26/2022	P	$50,001 - $100,000	
Inherited IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	JT	04/26/2022	P	$100,001 - $250,000	
Inherited IRA ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	JT	04/26/2022	P	$1,001 - $15,000	
Inherited IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	04/26/2022	P	$1,001 - $15,000	
Inherited IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	JT	04/26/2022	P	$15,001 - $50,000	
Kim’s 401(a) with VMMC ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		12/21/2022	P	$1,001 - $15,000	
Kim's 403b - Pre-2009 ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		05/24/2022	P	$100,001 - $250,000	
Kim's 403b - Pre-2009 ⇒ Fidelity US Bond Index (FXNAX) [MF]		05/24/2022	S (partial)	$100,001 - $250,000	☐
Kim's 403b with VMMC ⇒ Vanguard 500 Index Adm (VFIAX) [MF]		04/4/2022	P	$100,001 - $250,000	
Kim's 403b with VMMC ⇒ Vanguard Developed Markets Index Admiral (VTMGX) [MF]		12/16/2022	P	$1,001 - $15,000	
Kim's 403b with VMMC ⇒ VANGUARD MID-CAP VALUE INDEX ADMIRAL (VMMAX) [MF]		04/4/2022	S	$250,001 - $500,000	☐
Kim's 403b with VMMC ⇒ VANGUARD MID-CAP VALUE INDEX ADMIRAL (VMMAX) [MF]		03/22/2022	P	$1,001 - $15,000	
Kim's 403b with VMMC ⇒ Vanguard Small Cap Growth Index Adm (VSGAX) [MF]		04/4/2022	P	$50,001 - $100,000	
Kim's Roth IRA - 2014 ⇒ iShares Trust ESG Aware MSCI USA SML CAP (ESML) [EF]		01/19/2022	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Samuel Gowing Trust ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		03/14/2022	S (partial)	$1,001 - $15,000	☐
Samuel Gowing Trust ⇒ Vanguard ESG INTL STK ETF (VSGX) [EF]		03/16/2022	P	$1,001 - $15,000	
Samuel Gowing Trust ⇒ Vanguard ESG US Stock (ESGV) [EF]		03/14/2022	P	$1,001 - $15,000	
Samuel Gowing Trust ⇒ Vanguard ESG US Stock (ESGV) [EF]		05/23/2022	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
JT	TD Ameritrade Institutional	December 2021	Brokerage firm purchased securities, partially on margin. Note: paid off in March, 2022.	$500,001 - $1,000,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
October 2017	Kim Schrier and Virginia Mason Medical Center	Ongoing leave of absence.
October 2017	Filer and the Virginia Mason Medical Center - 401(a) Plan	Defined contribution plan that provides service retirement benefits.
October 2017	Filer and the Virginia Mason Medical Center - 403 (b) Plan	Defined contribution plan that provides service retirement benefits.
June 2000	Filer and Stanford Health Care Retirement Savings Plan	Defined contribution plan that provides service retirement benefits.

Schedule G: Gifts

None disclosed.

Schedule H: Travel Payments and Reimbursements

None disclosed.

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Asset Class Details

- David's IRA (Owner: SP)
- Gowing Family Trust Primary Account (Owner: JT)
  Description: Kimberly Schrier Gowing and David Noble Gowing Trustees
- Inherited IRA (Owner: JT)
  Description: Inherited in October, 2021.
- Kim's 401(a) with VMMC
- Kim's 403b - Pre-2009
- Kim's 403b with VMMC
- Kim's Roth IRA - 2014
- Samuel Gowing Trust
  Description: Trust for son's education
- Stanford Health Care Retirement Savings Plan
  Location: US

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

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: Hon. Kim Dr Schrier , 05/15/2023