



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Janice D. Schakowsky  
**Status:** Member  
**State/District:** IL09

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 05/12/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AmCap Fund Inc Class A [MF]	SP	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
AmCap Fund Inc Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
American High Income Trust Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Bond Fund of America [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Bright Directions - Advisor Guided 529 College Savings [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
CIBC Checking [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
CIBC Checking [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Devon Bank Checking #1 [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Devon Bank Checking #2 [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Eurpac Growth Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Franklin Strategic SE [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Fundamental Investors [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Growth Fund of America [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Growth Fund of America [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Hartford Mutual MidCap Fund Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Hartford Mutual World Bank Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Intermediate Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual Money Market (Deposit Held by Dreyfus, Inc) [BA]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Putnam Equity Inc [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Small Cap World Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Illinois [PE]		Undetermined	Tax-Deferred		<input type="checkbox"/>
United of Omaha [WU]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Washington Mutual Investor Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

\* 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?
Bond Fund of America [MF]	SP	12/28/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
BrightDirections [5P] LOCATION: IL	JT	03/25/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
BrightDirections [5P] LOCATION: IL	JT	08/4/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
BrightDirections [5P] LOCATION: IL	JT	12/13/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Hartford Mutual World Bank Fund [MF]	SP	12/2/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

\* 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
State of Illinois	Legislative Pension	\$32,818.00
Strategic Consulting Group, NA	Spouse's Salary	N/A
Required Minimum Distribution- Northwestern Mutual	IRA Distribution	\$9,014.00
Spouse IRA -Required Minimum Distribution - Wells Fargo- Robert Boggs Creamer Beneficiary IRA Adelaide B. Creamer- WRCS Custodian	IRA Distribution	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Chase	10/21	Mortgage - 1101 Ridge Ave, Evanton, IL - Home	\$250,001 - \$500,000
JT	Chase	10/21	Mortgage- 1711 Lake Shore Drive, Michigan City, IN -Vacation Home	\$100,001 - \$250,000
SP	Citi Bank	12/17	Credit Card Debt	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	International Labor Rights Forum
COMMENTS: Uncompensated	
Policy Council Member	Citizen Action/Illinois
COMMENTS: Uncompensated	

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 1999	State of Illinois-Jan Schakowsky	Continued Participation in State Pension Plan

## 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?
Aspen Institute Inc. (Congressional Program)	05/30/2022	06/6/2023	Chicago Illinois - Geneva, Switzerland - Chicago, Illinois	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COMMENTS: Seminar with other Members of Congress and Scholars							
Aspen Institute Inc. (Congressional Program)	08/29/2022	09/2/2022	Chicago, Illinois - Reuykjavik, Iceland - Chicago, Illinois	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COMMENTS: Seminar with other Members of Congress and Scholars							

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

None disclosed.

## 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. Janice D. Schakowsky , 05/12/2023