Filing ID #10054295

# Financial Disclosure Report

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## Filer Information

**Name:** Hon. Andy Harris
**Status:** Member
**State/District:** MD01

## 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? |
|---|---|---|---|---|---|
| 403b American Century Emerging Markets [MF]<br>Description: exchange to target retirement 2020 | | None | Tax-Deferred | | ✓ |
| 403b American Century Global Gold [MF]<br>Description: exchange to target retirement 2020 | | None | Tax-Deferred | | ✓ |
| 403b American Century International Opportunities [MF]<br>Description: exchange to target retirement 2020 | | None | Tax-Deferred | | ✓ |
| 403b American Century Short Duration Bond [MF]<br>Description: exchange to target retirement 2020 | | None | Tax-Deferred | | ✓ |
| 403b American Century Strategic Allocation [MF]<br>Description: exchange to target retirement 2020 | | None | Tax-Deferred | | ✓ |
| 403b CREF Inflation Linked Bond [MF] | | $100,001 - $250,000 | Tax-Deferred | | ☐ |
| 403b TIAA Traditional [MF] | | $250,001 - $500,000 | Tax-Deferred | | ☐ |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
| --- | --- | --- | --- | --- | --- |
| 403b Vanguard Capital Opportunity [MF]<br>DESCRIPTION: transferred to target retirement 2020 | | None | Tax-Deferred | | ✓ |
| 403b Vanguard Emerging Market [MF] | | $50,001 - $100,000 | Tax-Deferred | | |
| 403b Vanguard Energy [MF]<br>DESCRIPTION: transfer to target retirement 2020 | | None | Tax-Deferred | | ✓ |
| 403b Vanguard Life Strategy Growth [MF]<br>DESCRIPTION: transferred to target retirement 2020 | | None | Tax-Deferred | | ✓ |
| 403b Vanguard MidCap Index [MF] | | $50,001 - $100,000 | Tax-Deferred | | |
| 403b Vanguard Pacific Index [MF]<br>DESCRIPTION: transferred to target retirement 2020 | | None | Tax-Deferred | | ✓ |
| 403b Vanguard REIT Index [MF]<br>DESCRIPTION: transfer to target retirement 2020 | | None | Tax-Deferred | | ✓ |
| 403b Vanguard Selected Value [MF]<br>DESCRIPTION: transferred to target retirement 2020 | | None | Tax-Deferred | | ✓ |
| 403b Vanguard Short Term Investment Grade Bond Fund [MF]<br>DESCRIPTION: transferred to TIAA_CREF 7/21 | | None | Tax-Deferred | | ✓ |
| CREF 403b Equity Index [MF] | | $250,001 - $500,000 | Tax-Deferred | | |
| CREF Money Market [MF] | | $250,001 - $500,000 | Tax-Deferred | | |
| Fidelity Charitable Gift Fund [OT]<br>DESCRIPTION: Charitable Gift Fund | | $50,001 - $100,000 | None | | |
| IRA T Rowe Price Intl Discovery [MF] | | $50,001 - $100,000 | Tax-Deferred | | |
| IRA T Rowe Price Money Market [IH] | | $15,001 - $50,000 | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| M & T Checking [BA] | JT | $1,001 - $15,000 | Interest | $1 - $200 | ☐ |
| McCormick & Company, Incorporated (MKC) [ST]<br>Description: IRA | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| MD 457/401(K) State Investment Contract Pool [MF] | | $100,001 - $250,000 | Tax-Deferred | | ☐ |
| MD 457/401(K) Vanguard Institutional Index [MF] | | $50,001 - $100,000 | Tax-Deferred | | ☐ |
| Merck & Company, Inc. Common Stock (MRK) [ST]<br>Description: IRA | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| Merrill IRA Money Market [IH] | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| State of Maryland Pension [DB] | | Undetermined | Pension | $5,001 - $15,000 | ☐ |
| T Rowe Price Charitable Gift Fund [OT]<br>Description: T Rowe Price Charitable Gift Fund | JT | $50,001 - $100,000 | None | | ☐ |
| T Rowe Price Short term Bond [MF]<br>Description: Rollover IRA | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| Vanguard Short Term Bond [MF]<br>Description: withdrawal 4/22 | | None | None | | ☑ |
| Vanguard Target Retirement 2020 [MF] | | $1,000,001 - $5,000,000 | Tax-Deferred | | ☑ |

* 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? |
|---|---|---|---|---|---|
| american century emerging markets [MF]<br><br>DESCRIPTION: to target retirement 2020 | | 07/21/2022 | E | $50,001 - $100,000 | |
| american century global gold [MF]<br><br>DESCRIPTION: to target retirement 2020 | | 07/21/2022 | E | $50,001 - $100,000 | |
| american century international opportunities [MF]<br><br>DESCRIPTION: to target retirement 2020 | | 07/21/2022 | E | $100,001 - $250,000 | |
| american century short duration [MF]<br><br>DESCRIPTION: to target retirement 2020 | | 07/21/2022 | E | $250,001 - $500,000 | |
| american century strategic allocation aggressive [MF]<br><br>DESCRIPTION: to target retirement 2020 | | 07/21/2022 | E | $100,001 - $250,000 | |
| vanguard capital opportunity fund [MF]<br><br>DESCRIPTION: to target retirement 2020 | | 07/21/2022 | E | $100,001 - $250,000 | |
| vanguard energy fund [MF]<br><br>DESCRIPTION: to target retirement 2020 | | 07/21/2022 | E | $50,001 - $100,000 | |
| Vanguard Life Strategy Growth [MF]<br><br>DESCRIPTION: exchange to target retirement 2020 | | 07/21/2022 | E | $50,001 - $100,000 | |
| vanguard pacific stock index fund [MF]<br><br>DESCRIPTION: to target retirement 2020 | | 07/21/2022 | E | $15,001 - $50,000 | |
| Vanguard REIT Fund [MF]<br><br>DESCRIPTION: to target retirement 2020 | | 07/21/2022 | E | $100,001 - $250,000 | |
| vanguard selected value fund [MF]<br><br>DESCRIPTION: to target retirement 2020 | | 07/21/2022 | E | $50,001 - $100,000 | |
| Vanguard short term investment grade fund [MF] | | 07/21/2022 | E | $250,001 - | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| | | | | $500,000 | |
| Description: to target retirement 2020 | | | | | |
| Vanguard Target Retirement 2020 [MF] | | 07/21/2022 | E | $1,000,001 - $5,000,000 | |
| Description: Exchange into this fund from multiple Johns Hopkins 403(b) accounts, the result of Hopkins consolidating the 403(b).into TIAA-CREF.<br>Comments: Exchange into this fund from multiple Johns Hopkins 403(b) accounts, the result of Hopkins consolidating the 403(b).into TIAA-CREF. | | | | | |

* 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 | Navy Federal Credit Union | July 2013 | Mortgage on vacation home, Cambridge, Maryland (not rented) | $100,001 - $250,000 |
| JT | Pentagon Federal Credit Union | July 2013 | Mortgage on personal residence, Cockeysville, Maryland (not rented) | $250,001 - $500,000 |

## Schedule E: Positions

| Position | Name of Organization |
|---|---|
| Finance Committee Member | St. Joseph Hospital University of Maryland Health System |
| Comments: not compensated nonprofit | |

## Schedule F: Agreements

| Date | Parties To | Terms of Agreement |
|---|---|---|
| January 2014 | State of Maryland | Health coverage |
| January 2014 | State of Maryland | Pension |

## 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?** |
| Conservative Partnership Institute, Inc | 02/10/2022 | 02/12/2022 | Baltimore - Jacksonville - Baltimore | 0 | ☑ | ☑ | ☐ |
| Conservative Partnership Institute, Inc. | 02/12/2022 | 02/13/2022 | Baltimore - Jacksonville - Baltimore | 0 | ☑ | ☑ | ☐ |
| US Israel Education Association (USIEA) | 04/29/2022 | 05/8/2022 | Washington DC - Tel Aviv - Washington DC | 0 | ☑ | ☑ | ☐ |

## 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

## 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. Andy Harris , 05/15/2023