

**UNITED STATES HOUSE OF REPRESENTATIVES  
FINANCIAL DISCLOSURE STATEMENT**

For New Members, Candidates, and New Employees

**FORM B**

MAY 05 2022

Page 1 of 12

Name: Emily Beach

Daytime Telephone \_\_\_\_\_

2022 MAY 10 AM 11:27

LEGISLATIVE RESOURCE CENTER

OFFICE OF THE CLERK  
U.S. HOUSE OF REPRESENTATIVES

CC

FILER STATUS	<input checked="" type="checkbox"/> New Member of or Candidate for U.S. House of Representatives	State: <u>CA</u> District: <u>15</u>	<input type="checkbox"/> Check if Amendment
	<input type="checkbox"/> Candidates - Date of Election: <u>6/7/22</u>		
	<input type="checkbox"/> New Officer or Employee	Staff Filer Type (if Applicable):	Period Covered: January 1, <u>2021</u> to <u>4/30/22</u>
	<input type="checkbox"/> Employing Office: _____	<input type="checkbox"/> Shared <input type="checkbox"/> Principal Assistant	

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

**PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS**

<p>A. Did you, your spouse, or your dependent child:</p> <p>a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <b>OR</b></p> <p>b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>
<p>C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p>	<p>F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>
<p>D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>	<p>J. Did you receive compensation of more than \$5,000 from a single source in the current year and two prior years?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>

**ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"**

**THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE**

**EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER BOTH OF THESE QUESTIONS**

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 that benefits you, your spouse, or dependent child?

Yes  No

EXEMPTION - Have you excluded from this report any other assets, "unearned" income, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.

Yes  No







Filer Information: Emily Beach  
 Status: Candidate  
 State/District: CA-15  
 Filing Type: Candidate  
 Filing Year: 2022  
 Filing Date: 5/5/2022

SP/DC/JT	Block A Assets	EIF	Block B Value of Asset	Block C Type of Income	Block D - Amount of Income Current Year	Preceding Year
----------	-------------------	-----	---------------------------	---------------------------	--	----------------

ATTACHMENT 1 & 2

	Brown Advisory Sustainable Growth Fund	X	\$15,001-\$50,000	Tax-Deferred	None	None
	Ishares MSCI KLD 400 Social ETF	X	\$15,001-\$50,000	Tax-Deferred	None	None
	Nuveen ESG Large Cap Value Fund	X	\$15,001-\$50,000	Tax-Deferred	None	None
	Parnassus Core Equity Fund	X	\$15,001-\$50,000	Tax-Deferred	None	None
	Vanguard ESG US Stock Fund	X	\$15,001-\$50,000	Tax-Deferred	None	None
	Vanguard ESG International Stock Fund	X	\$1,001-\$15,000	Tax-Deferred	None	None
	Pax Ellevest Global Women's Leadership Fund	X	\$15,001-\$50,000	Tax-Deferred	None	None
	Trillium ESG Global Equity Fund	X	\$15,001-\$50,000	Tax-Deferred	None	None
	Ishares ESG 1-5Yr Corporate Bond ETF	X	\$15,001-\$50,000	Tax-Deferred	None	None
	Pimco Enhanced Short Maturity ETF	X	\$1,001-\$15,000	Tax-Deferred	None	None
	TIAA Core Impact Bond Fund	X	\$1,001-\$15,000	Tax-Deferred	None	None
	Touchstone Impact Bond Fund	X	\$1,001-\$15,000	Tax-Deferred	None	None
	Cash		\$15,001-\$50,000	Tax-Deferred	None	None

ATTACHMENT 3

SP	Brown Advisory Sustainable Growth Fund	X	\$50,001-\$100,000	Tax-Deferred	None	None
SP	Ishares MSCI KLD 400 Social ETF	X	\$15,001-\$50,000	Tax-Deferred	None	None
SP	Nuveen ESG Large Cap Value Fund	X	\$15,001-\$50,000	Tax-Deferred	None	None
SP	Parnassus Core Equity Fund	X	\$50,001-\$100,000	Tax-Deferred	None	None
SP	Vanguard ESG US Stock Fund	X	\$50,001-\$100,000	Tax-Deferred	None	None
SP	Vanguard ESG International Stock Fund	X	\$15,001-\$50,000	Tax-Deferred	None	None
SP	Pax Ellevest Global Women's Leadership Fund	X	\$50,001-\$100,000	Tax-Deferred	None	None
SP	Trillium ESG Global Equity Fund	X	\$50,001-\$100,000	Tax-Deferred	None	None

Filer Information: Emily Beach  
 Status: Candidate  
 State/District: CA-15  
 Filing Type: Candidate  
 Filing Year: 2022  
 Filing Date: 5/5/2022

SP	Ishares ESG 1-5Yr Corporate Bond ETF	X	\$50,001-\$100,000	Tax-Deferred	None	None
SP	Pimco Enhanced Short Maturity ETF	X	\$15,001-\$50,000	Tax-Deferred	None	None
SP	TIAA Core Impact Bond Fund	X	\$15,001-\$50,000	Tax-Deferred	None	None
SP	Touchstone Impact Bond Fund	X	\$15,001-\$50,000	Tax-Deferred	None	None
SP	Cash		\$15,001-\$50,000	Tax-Deferred	None	None

## ATTACHMENT 4

JT	Brown Advisory Sustainable Growth Fund	X	\$15,001-\$50,000	Dividends, Capital Gains	None	\$201-\$1,000
JT	Ishares MSCI KLD 400 Social ETF	X	\$15,001-\$50,000	Dividends	\$1-\$200	\$201-\$1,000
JT	Nuveen ESG Large Cap Value Fund	X	\$15,001-\$50,000	None	None	None
JT	Parnassus Core Equity Fund	X	\$15,001-\$50,000	Dividends, Capital Gains	\$1-\$200	\$1,001-\$2,500
JT	Vanguard ESG US Stock Fund	X	\$15,001-\$50,000	Dividends	\$1-\$200	\$201-\$1,000
JT	Vanguard ESG International Stock Fund	X	\$1,001-\$15,000	Dividends	\$1-\$200	\$201-\$1,000
JT	Pax Ellevest Global Women's Leadership Fund	X	\$15,001-\$50,000	None	None	None
JT	Trillium ESG Global Equity Fund	X	\$15,001-\$50,000	Dividends, Capital Gains	None	\$201-\$1,000
JT	Ishares ESG 1-5Yr Corporate Bond ETF	X	\$15,001-\$50,000	Dividends, Capital Gains	\$1-\$200	\$1-\$200
JT	Pimco Enhanced Short Maturity ETF	X	\$1,001-\$15,000	Dividends	\$1-\$200	None
JT	TIAA Core Impact Bond Fund	X	\$1,001-\$15,000	Dividends	\$1-\$200	\$201-\$1,000
JT	Touchstone Impact Bond Fund	X	\$1,001-\$15,000	Dividends	\$1-\$200	\$201-\$1,000
JT	Cash		\$15,001-\$50,000	Interest	None	None
JT	Harding Loevner International Stock Fund	X	None	Dividends, Capital Gains	None	\$201-\$1,000
JT	Parnassus Mid Cap Stock Fund	X	None	Dividends, Capital Gains	None	\$201-\$1,000

Filer Information: Emily Beach  
 Status: Candidate  
 State/District: CA-15  
 Filing Type: Candidate  
 Filing Year: 2022  
 Filing Date: 5/5/2022

JT	Ishares MSCI USA ESG Select ETF	X	None	Dividends	None	\$201-\$1,000
JT	Ishares ESG Corporate Bond ETF	X	None	Dividends	None	\$1-\$200
JT	Medtronic Stock		None	Dividends	None	\$1-\$200
JT	Pepsico Inc Stock		None	Dividends	None	\$1-\$200
JT	Store Capital Corp Stock		None	Dividends	None	\$1-\$200

**SCHEDULE C -- EARNED INCOME**

Name: **Emily Beach**

Page **8** of **12**

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. government) totaling \$200 or more during the reporting period. For both the filer and filer's spouse, list the source and amount of any honoraria. List only the source for other spouse earned income exceeding \$1,000. See examples below.  
**EXCLUDE:** Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.  
**INCOME LIMITS and PROHIBITED INCOME:** Be advised that the outside earned income limit and prohibitions on types of income may apply to you after you are on House payroll. The 2021 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$29,595. The 2022 limit is \$29,895. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited for Members and senior staff.

Source (include date of receipt for honoraria)	Type	Amount	
		Current Year to Filing	Preceding Year
<b>Examples:</b> ABC Trade Association, Baltimore, MD (July 15) State of Maryland Civil War Roundtable (Oct. 2) Ontario County Board of Education	Honorarium	\$0	\$500
	Salary	\$20,000	\$79,000
	Spouse Speech	\$0	\$1,000
	Spouse Salary	N/A	N/A
City of Burlingame	Salary	\$2,482.11	\$7,170.54
San Mateo County Transportation Authority	Wages	\$400	\$1,500
San Mateo County Express Lanes Joint Powers Authority	Wages	\$400	\$1,200
Coblentz Patch Duffy and Bass LLP	Spouse Salary	N/A	N/A

Use additional sheets if more space is required.

# SCHEDULE D - LIABILITIES

Name: **Emily Beach**

Page **9** of **12**

Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. **New Members:** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. \*Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability																	
				A	B	C	D	E	F	G	H	I	J	K							
Example	First Bank of Wilmington, DE	5/20	Mortgage on Rental Property, Dover, DE				X														
	NONE																				

# SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude:** Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. **New Members and second-year candidates** report positions held in the reporting period and the current calendar year. **First-year candidates and new employees** report positions held in the current calendar year and two previous years.

Position	Name of Organization
Councilmember	City of Burlingame
Director	San Mateo County Transportation Authority
Director	San Mateo County Express Lane Joint Powers Authority
Board Member	League of California Cities State Board of Directors (uncompensated)
Board Member	League of California Cities Peninsula Division (uncompensated)

See continuation sheet  
Use additional sheets if more space is required.

Filer Information: Emily Beach  
Status: Candidate  
State/District: CA-15  
Filing Type: Candidate Filing  
Year: 2022 Filing Date:  
5/5/2022

**Schedule E: Positions**

<u>Position</u>	<u>Name of Organization</u>
Board Member	Peninsula Traffic Congestion Relief Alliance (Commute.org) (Uncompensated)
Alternate Board Member	San Mateo County Emergency Services Council (Uncompensated)
Alternate Board Member	City/County Association of Governments of San Mateo County (2020) (Uncompensated)
Board Member	Leadership Council San Mateo County (Uncompensated)
Owner/Sole Proprietor	Jungle Queen Records

**SCHEDULE F -- AGREEMENTS**

Name: **Emily Beach**

Page 11 of 12

Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement
	NONE	

**SCHEDULE J -- COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

Report sources of compensation received by you or your business affiliation for services provided directly by you during the current year and two prior years. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise if you directly provided the services generating a fee or payment of more than \$5,000. Exclude: Payments by the U.S. government and any information considered confidential as a result of a privileged relationship recognized by law. Do not repeat information listed on Schedule C.

Source (Name and City/State)	Brief Description of Duties
Example: Doe Jones & Smith, Hometown, State	Accounting Services
NONE	

Use additional sheets if more space is required.

**FILER NOTES  
(Optional)**

Name: Emily Beach Page 12 of 12

NOTE NUMBER	NOTES
NONE	

Use additional sheets if more space is required.