



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Lee Michael Zeldin  
**Status:** Former Member  
**State/District:** NY01

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2023  
**Filing Date:** 02/1/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
3024 Oakhill St [RP]  LOCATION: Sierra Vista/Cochise, AZ, US		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ D F A EMERGING MARKETS CORE EQUITY I [OT]  DESCRIPTION: 401k	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ D F A INTERNATIONAL CORE EQUITY I [OT]  DESCRIPTION: 401k	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ D F A US CORE EQUITY 1 I [OT]  DESCRIPTION: 401k	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ DFA GLOBAL REAL ESTATE SECURITIES [OT]  DESCRIPTION: 401k	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ VANGUARD 500 INDEX ADMIRAL [OT]  DESCRIPTION: 401k	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
CDF & S RETIREMENT PLAN ⇒ VANGUARD MID CAP INDEX ADM [OT]  DESCRIPTION: 401k	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ VANGUARD SHORT-TERM BOND INDEX ADM [OT]  DESCRIPTION: 401k	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
CDF & S RETIREMENT PLAN ⇒ VANGUARD TOTAL BOND MARKET INDEX ADM [OT]  DESCRIPTION: 401k	SP	\$1,001 - \$15,000	Tax-Deferred		<input 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

None disclosed.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount
Carter Deluca Farrell and Schmidt Melville, NY	Spouse Salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	American Express	December 2022	Credit Card Debt	\$10,000 - \$15,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## 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**

- CDF & S RETIREMENT PLAN (Owner: SP)

## **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. Lee Michael Zeldin , 02/1/2023