Filing ID #10056593

Financial Disclosure Report

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Filer Information

Name: Peter I. Ohtaki
Status: Congressional Candidate
State/District: CA16

Filing Information

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 01/15/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 DC1 ⇒ Fidelity 529 age-based fund [MF]	DC	$15,001 - $50,000	Tax-Deferred		
529 DC1 ⇒ TIAA-CREF age-based fund [MF]	DC	$50,001 - $100,000	Tax-Deferred		
529 DC2 ⇒ Fidelity 529 age-based fund [MF]	DC	$15,001 - $50,000	Tax-Deferred		
529 DC2 ⇒ TIAA-CREF age-based fund [MF]	DC	$50,001 - $100,000	Tax-Deferred		
529 DC3 ⇒ Fidelity 529 age-based fund [MF]	DC	$50,001 - $100,000	Tax-Deferred		
Empower 401K ⇒ State Street [MF]		$100,001 - $250,000	Tax-Deferred		
Empower 401K ⇒ Wells Fargo & Company (WFC) [ST]		$50,001 - $100,000	Tax-Deferred		
Fidelity IRA ⇒	SP	$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Magellan [MF]		$100,000			
Ohtaki Family Revocable Trust ⇒ Primary residence in Menlo Park, CA [RP] LOCATION: Menlo Park, CA, US DESCRIPTION: Primary residence.		$1,000,001 - $5,000,000	Rent	$5,001 - $15,000	$5,001 - $15,000
Ohtaki Family Revocable Trust ⇒ Rental property in Menlo Park, CA [RP] LOCATION: San Mateo County, CA, US DESCRIPTION: Single family residence		$1,000,001 - $5,000,000	Rent	$50,001 - $100,000	$50,001 - $100,000
Schwab IRA ⇒ DoubleLine bond [MF]		$50,001 - $100,000	Tax-Deferred		
Schwab IRA ⇒ Invesco dev markets [MF]		$50,001 - $100,000	Tax-Deferred		
Schwab IRA ⇒ Invesco FTSE RAFI [EF]		$100,001 - $250,000	Tax-Deferred		
Schwab IRA ⇒ IShares ETF [EF]		$50,001 - $100,000	Tax-Deferred		
Schwab IRA ⇒ IShares MSCI EAFE [EF]		$100,001 - $250,000	Tax-Deferred		
Schwab IRA ⇒ Money Market Funds [BA]		$15,001 - $50,000	Tax-Deferred		
Schwab IRA ⇒ Schwab ETFs [EF]		$50,001 - $100,000	Tax-Deferred		
Schwab IRA ⇒ USAA Income [MF]		$50,001 - $100,000	Tax-Deferred		
Schwab IRA ⇒ Vanguard bond [MF]		$100,001 - $250,000	Tax-Deferred		
Schwab IRA ⇒ Vanguard equity index [MF]		$100,001 - $250,000	Tax-Deferred		
Schwab IRA ⇒		$100,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard ETFs [EF]		$250,000			
Schwab IRA ⇒ Western Asset bond [MF]		$15,001 - $50,000	Tax-Deferred		
Wells Fargo IRA ⇒ Allspring Index [MF]		$100,001 - $250,000	Tax-Deferred		
Wells Fargo IRA ⇒ Apple Inc. (AAPL) [ST]		$250,001 - $500,000	Tax-Deferred		

* 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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Wells Fargo & Co.	Salary	$166,173.00	$152,815.00
Metzia, Inc.	spouse salary	$15,000.00	$648.00
Renter of Leland Ave house	Rental income	$78,000.00	$78,000.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Rocket Mortgage	December 2020	Mortgage on rental property	$250,001 - $500,000
JT	JP Morgan Chase	2020	Credit cards	$15,001 - $50,000
JT	Citibank	2019	Credit cards	$50,001 - $100,000
JT	Bank of American	2019	Credit cards	$15,001 - $50,000
JT	Wells Fargo	2020	Credit cards	$15,001 - $50,000
	Mechanics Bank	2022	Mortgage	$500,001 - $1,000,000

Schedule E: Positions

Position	Name of Organization
Employee	Wells Fargo Bank

Schedule F: Agreements

None disclosed.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

None disclosed.

Schedule A Asset Class Details

- 529 DC1 (Owner: DC)
  Location: CA
- 529 DC2 (Owner: DC)
  Location: CA
- 529 DC3 (Owner: DC)
  Location: CA
- Empower 401K
  Description: Wells Fargo 401K plan
- Fidelity IRA (Owner: SP)
  Description: Rollover IRA
- Ohtaki Family Revocable Trust
- Schwab IRA
  Description: Rollover IRA
- Wells Fargo IRA
  Description: Traditional IRA

Exclusions of Spouse, Dependent, or Trust Information

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: Peter I. Ohtaki , 01/15/2024