Filing ID #10057252

Financial Disclosure Report

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Filer Information

Name: Hon. Young Kim
Status: Member
State/District: CA40

Filing Information

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/6/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
AIG Life Insurance ⇒ AIG Life Insurance [WU]		$1,001 - $15,000	None		☐
Charles Schwab IRA ⇒ Brokerage Sweep Account [BA]		$1,001 - $15,000	Tax-Deferred		☐
Charles Schwab IRA ⇒ DFA Emerging Markets Core [MF]		$15,001 - $50,000	Tax-Deferred		☑
Charles Schwab IRA ⇒ DFA Global Real Estate [MF]		$15,001 - $50,000	Tax-Deferred		☐
Charles Schwab IRA ⇒ DFA International Core Equity [MF]		$50,001 - $100,000	Tax-Deferred		☑
Charles Schwab IRA ⇒ DFA International Small [MF]		$15,001 - $50,000	Tax-Deferred		☐
Charles Schwab IRA ⇒ DFA International Value [MF]		$15,001 - $50,000	Tax-Deferred		☐
Charles Schwab IRA ⇒ DFA Intl Hi Relatv Profitability [MF]		$15,001 - $50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Charles Schwab IRA ⇒ DFA Investment Grade [MF]		$50,001 - $100,000	Tax-Deferred		✓
Charles Schwab IRA ⇒ DFA Short Term Extened Quality Port [MF]		$15,001 - $50,000	Tax-Deferred		
Charles Schwab IRA ⇒ DFA Short-Duration Real [MF]		$1,001 - $15,000	Tax-Deferred		
Charles Schwab IRA ⇒ DFA US Core Equity 2 [MF]		$50,001 - $100,000	Tax-Deferred		
Charles Schwab IRA ⇒ DFA US Hi Relatv Profitability [MF]		$15,001 - $50,000	Tax-Deferred		
Charles Schwab IRA ⇒ DFA US Large Cap Value [MF]		$1,001 - $15,000	Tax-Deferred		
Charles Schwab IRA ⇒ DFA US Small Cap [MF]		$1,001 - $15,000	Tax-Deferred		
Charles Schwab IRA ⇒ DFA US Targeted Value [MF]		$15,001 - $50,000	Tax-Deferred		✓
Mass Mutual ⇒ Mass Mutual (Fixed Annuity) [FN] DESCRIPTION: Tax sheltered annuity		$1,001 - $15,000	Tax-Deferred		
Residential property [RP] LOCATION: La Habra, CA, US		$1,000,001 - $5,000,000	Rent	$15,001 - $50,000	
Wells Fargo Bank [BA] DESCRIPTION: Personal checking & savings	JT	$100,001 - $250,000	Interest	$1 - $200	

* Investment vehicle 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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Charles Schwab IRA ⇒ DFA Emerging Markets Core Equity Portfolio (DFCEX) [MF]		11/30/2023	P	$1,001 - $15,000	
Charles Schwab IRA ⇒ DFA International Core Equity Portfolio (DFIEX) [MF]		03/21/2023	S (partial)	$1,001 - $15,000	☐
Charles Schwab IRA ⇒ DFA International Core Equity Portfolio (DFIEX) [MF]		06/29/2023	P	$1,001 - $15,000	
Charles Schwab IRA ⇒ DFA Investment Grade Portfolio (DFAPX) [MF]		12/13/2023	P	$1,001 - $15,000	
Charles Schwab IRA ⇒ DFA Investment Grade Portfolio (DFAPX) [MF]		02/1/2023	P	$1,001 - $15,000	
Charles Schwab IRA ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		03/21/2023	P	$1,001 - $15,000	

* Investment vehicle 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

None disclosed.

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Loan Depot	March 2019	Mortgage	$250,001 - $500,000

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 Investment Vehicle Details

- AIG Life Insurance
  Description: Whole Life Insurance Cash Accumulated Value
- Charles Schwab IRA
- Mass Mutual
  Location: US

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. Young Kim , 08/6/2024