



FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Adam B. Schiff
Status: Member
State/District: CA30

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/7/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Brokerage ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	JT	None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Brokerage ⇒ Fidelity Cash Reserves [BA]	JT	\$1 - \$1,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Franklin Templeton ⇒ Franklin Growth Opportunities Fund Class A (FGRAX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Franklin Templeton ⇒ Franklin Managed Trust Rising Dividends Fund Cl A (FRDPX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Franklin Templeton ⇒ Franklin Mutual Shares Fund, Class A (TESIX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Franklin Templeton ⇒ Mutual Global Discovery Fund Class A (TEDIX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Inherited IRA ⇒ T. Rowe Price New Horizons Fund (PRNHX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Midnight in Washington [OT]		Undetermined	Royalties	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Book approved by ethics committee					
UBS ⇒ Apple Inc. (AAPL) [ST]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
UBS ⇒ Invesco QQQ Trust (QQQ) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
UBS ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
UBS ⇒ UBS Bank USA Deposit [BA]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
UBS - Individual Retirement Account ⇒ Fidelity Puritan Fund (FPURX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
UBS - Individual Retirement Account ⇒ Invesco QQQ Trust [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
UBS - Individual Retirement Account ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
UBS - Individual Retirement Account ⇒ UBS Bank USA Deposit [BA]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
UBS - Individual Retirement Account ⇒ WP Carey Inc REIT (WPC) [RE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

* 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?
Fidelity Brokerage ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	JT	01/13/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	JT	03/29/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Brokerage ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	JT	04/12/2023	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Franklin Templeton ⇒ Franklin Growth Opportunities Fund Class A (FGRAX) [MF]	JT	12/20/2023	P	\$15,001 - \$50,000	
Franklin Templeton ⇒ Franklin Managed Trust Rising Dividends Fund Cl A (FRDPX) [MF]	JT	12/20/2023	P	\$1,001 - \$15,000	
Franklin Templeton ⇒ Franklin Mutual Shares Fund, Class A (TESIX) [MF]	JT	10/2/2023	P	\$1,001 - \$15,000	
Franklin Templeton ⇒ Franklin Mutual Shares Fund, Class A (TESIX) [MF]	JT	12/20/2023	P	\$1,001 - \$15,000	
Franklin Templeton ⇒ Mutual Global Discovery Fund Class A (TEDIX) [MF]	JT	12/20/2023	P	\$1,001 - \$15,000	
UBS - Individual Retirement Account ⇒ Fidelity Puritan Fund (FPURX) [MF]	SP	12/18/2023	P	\$1,001 - \$15,000	
UBS - Individual Retirement Account ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		11/27/2023	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

Source	Type	Amount
Naborforce	Spouse wage	N/A
T. Rowe Price	Spouse inherited IRA distribution	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Mr. Cooper	November 2017	Mortgage on private residence in Potomac, MD	\$250,001 - \$500,000
JT	Snapfi	November 2020	Mortgage on private residence in Burbank,	\$100,001 -

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

- Fidelity Brokerage (Owner: JT)
LOCATION: US
- Franklin Templeton (Owner: JT)
LOCATION: US
- Inherited IRA (Owner: SP)
- UBS (Owner: SP)
LOCATION: US
- UBS - Individual Retirement Account
- UBS - Individual Retirement Account (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. Adam B. Schiff , 08/7/2024