



Filing ID #10057312

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Mike Levin
Status: Member
State/District: CA49

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/7/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity 401(k) ⇒ Fidelity Freedom Blend 2040 Fund (FHARX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA ⇒ Fidelity Capital and Income Fund (FAGIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA ⇒ Fidelity Freedom 2040 (FFFFX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity IRA ⇒ Fidelity International Sustainability Index Fund (FNIDX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity IRA ⇒ Fidelity OTC Pt (FOCPX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA ⇒ Fidelity Real Estate Income (FRIFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA ⇒ Fidelity Select Biotechnology Pt (FBIOX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA ⇒		\$100,001 -	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Select Environmental and Alternative Energy Ptf (FSLEX) [MF]		\$250,000			<input type="checkbox"/>
Fidelity IRA ⇒ Fidelity Sustainability Bond Index Fund (FNDSX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Freedom 2040 (FFFFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
US Bank Accounts [BA]	JT	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard 529 #1 ⇒ Vanguard Aggressive Growth Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 #1 ⇒ Vanguard Growth Index Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 #1 ⇒ Vanguard Mid-Cap Index Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 #2 ⇒ Vanguard Aggressive Growth Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 #2 ⇒ Vanguard Growth Index Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard 529 #2 ⇒ Vanguard Mid-Cap Index Portfolio [MF]	DC	\$15,001 - \$50,000	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 IRA ⇒ Fidelity Freedom 2040 (FFFFX) [MF]	SP	05/12/2023	P	\$1,001 - \$15,000	
Fidelity IRA ⇒ Fidelity Freedom 2040 (FFFFX) [MF]	SP	12/28/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity IRA ⇒ Fidelity International Sustainability Index Fund (FNIDX) [MF]		12/15/2023	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
Irvine Company	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Mr. Cooper	September 2020	Mortgage on Primary Residence	\$500,001 - \$1,000,000

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

- Fidelity 401(k) (Owner: SP)
- Fidelity IRA
- Fidelity IRA (Owner: SP)
- Fidelity Roth IRA (Owner: SP)

- Vanguard 529 #1 (Owner: DC)
LOCATION: NV
- Vanguard 529 #2 (Owner: DC)
LOCATION: NV

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. Mike Levin , 05/7/2024