Filing ID #10057340

Financial Disclosure Report

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Filer Information

Name: Hon. Rick Larsen
Status: Member
State/District: WA02

Filing Information

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 06/13/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Ameriprise Financial One Account/CNL Healthcare Inc (widely diversified property investment fund) [RE]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	
Ameriprise One Financial Account/Ameriprise Insured Money Market [BA] Description: Money market account within the Ameriprise One Financial Account	JT	$1,001 - $15,000	Interest	$3.69	
Ameriprise One Financial Account/Western Asset Intermediate Term Municipal Cl A [MF]	JT	$1 - $1,000	Dividends	None	
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ American Century Focused Dynamic Growth Fund - I Class (ACFSX) [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	✓
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Calvert Equity Fund Class I (CEYIX) [MF]	JT	None	Dividends	$201 - $1,000	✓
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ ClearBridge Select Fd I (LBFIX) [MF]	JT	$1,001 - $15,000	None		✓
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund	JT	$1,001 - $15,000	Dividends	$1 -	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
2 ⇒ Eaton Vance Emerging and Frontier Countries Equity Fund I (EICOX) [MF]				$200	
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Federated Hermes Kaufmann Small Cap Fund IS Shares (FKAIX) [MF]	JT	None	Dividends	$201 - $1,000	✓
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Fidelity Advisor Growth Opportunities Fund: Class I (FAGCX) [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	✓
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Fidelity Advisor International Growth Fund: Class I (FIIIX) [MF]	JT	None	Dividends	$201 - $1,000	✓
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Fidelity Advisor International Small Cap Fund: Class I (FIXIX) [MF]	JT	$1,001 - $15,000	Dividends	None	✓
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ JPMorgan Emerging Markets Equity Fund I Class (JEMSX) [MF]	JT	None	Dividends	$201 - $1,000	✓
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ JPMorgan Mid Cap Growth Fund I Class (HLGEX) [MF]	JT	None	Dividends	$201 - $1,000	✓
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ MFS Growth Fund Class I (MFEIX) [MF]	JT	None	Dividends	$201 - $1,000	✓
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Oberweis Small-Cap Opportunities Fund Institutional Class (OBSIX) [MF]	JT	$1,001 - $15,000	Dividends, Interest	None	✓
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ PGIM Jennison International Opportunities Fund Class Z (PWJZX) [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund	JT	None	Dividends	$201 -	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
2 ⇒ WCM Focused Emerging Markets Fund - Institutional Class (WCMEX) [MF]				$1,000	
Richard R Larsen and Tiia I Karlen Revocable Trust ⇒ ACC Cash Reserve Certificate [BA] DESCRIPTION: Moved balance ($1,001) into ONE Account in 2022. End value is 0. Keeping in portfolio for possible future use	JT	None	Interest	None	☐
Richard R Larsen and Tiia I Karlen Revocable Trust ⇒ Condo Property, Everett WA [RP] LOCATION: Everett, WA, US DESCRIPTION: Created Revocable Living Trust on March 18, 2018. Moved Everett property to the RLT on March 27, 2018	JT	$250,001 - $500,000	None		☐
Richard R Larsen and Tiia I Karlen Revocable Trust ⇒ Federal Congressional Credit Union/Money Market Account [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	☐
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Ameriprise Insured Money Market [BA]	JT	$1,001 - $15,000	Interest	$5.59	☐
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Columbia Strategic Municipal Income Fund Class I (CATZX) [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Goldman Sachs Dynamic Municipal Income Fund - Investor Class (GUIRX) [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☑
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Invesco Rochester Municipal Opportunities Fund Class Y (ORNYX) [MF] DESCRIPTION: purchased from sale of Eaton Vance asset	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Invesco SteelPath MLP Alpha Fund Class Y (MLPOX) [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ JHF Municipal Opportunities Fund - Class I (JTBDX) [MF] DESCRIPTION: same as John Hancock Fund Municipal Opportunity from CY 22. Just a name change	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ MainStay Cushing MLP Premier Fund, Class I (CSHZX) [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ MainStay MacKay Strategic Municipal Allocation Fund Class I (MTFGX) [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ MainStay MacKay Tax Free Bond Fund, Class I (MTBIX) [MF]	JT	None	Dividends	$201 - $1,000	✓
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Nuveen Strategic Municipal Opportunities Fund Class I (NSIOX) [MF]	JT	None	Dividends	$201 - $1,000	✓
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ PGIM Jennison MLP Fund Class Z (PRPZX) [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen IRA ⇒ Abbott Laboratories Common Stock (ABT) [ST]		None	Dividends	$201 - $1,000	✓
Richard R Larsen IRA ⇒ Allstate Corporation (ALL) [ST]		None	Dividends	$201 - $1,000	✓
Richard R Larsen IRA ⇒ American Water Works Company, Inc. (AWK) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise Brokerage Account/Ameriprise Insured Money Market [BA]		$1,001 - $15,000	Interest	$4.57	
DESCRIPTION: Money market account within IRA					
Richard R Larsen IRA ⇒ Amgen Inc. (AMGN) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Analog Devices, Inc. - Common Stock (ADI) [ST]		None	Dividends	$201 - $1,000	✓
Richard R Larsen IRA ⇒ Apple Inc. (AAPL) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ares Industrial REIT Inc Cl T [RE]		$15,001 - $50,000	None		
Richard R Larsen IRA ⇒ BlackRock, Inc. Common Stock (BLK) [ST]		None	Dividends	$201 - $1,000	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Richard R Larsen IRA ⇒ Booz Allen Hamilton Holding Corporation (BAH) [ST]		$1,001 - $15,000	Dividends	$1 - $200	No
Description: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Bristol-Myers Squibb Company (BMY) [ST]		$1,001 - $15,000	Dividends	$1 - $200	No
Description: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Broadcom Inc. (AVGO) [ST]		$1,001 - $15,000	Dividends	$1 - $200	No
Description: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Comcast Corporation - Class A (CMCSA) [ST]		$1,001 - $15,000	Dividends	$1 - $200	No
Description: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Costco Wholesale Corporation (COST) [ST]		$1,001 - $15,000	Dividends	$1 - $200	No
Description: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Elevance Health, Inc. Common Stock (ELV) [ST]		None	Dividends	$201 - $1,000	Yes
Richard R Larsen IRA ⇒ EOG Resources, Inc. (EOG) [ST]		$1,001 - $15,000	Dividends	$1 - $200	No
Description: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Essex Property Trust, Inc. (ESS) [ST]		$1,001 - $15,000	Dividends	$1 - $200	No
Description: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ General Dynamics Corporation Common Stock (GD) [ST]		$1,001 - $15,000	Dividends	$1 - $200	Yes
Description: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒		$1,001 - $15,000	Dividends	$1 -	No

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Hartford Financial Services Group, Inc. (HIG) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset				$200	
Richard R Larsen IRA ⇒ Home Depot, Inc. (HD) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen IRA ⇒ JP Morgan Chase & Co. (JPM) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1 - $1,000	Dividends	$1 - $200	☐
Richard R Larsen IRA ⇒ Marsh & McLennan Companies, Inc. Common Stock (MMC) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1 - $1,000	Dividends	$1 - $200	☑
Richard R Larsen IRA ⇒ Mastercard Incorporated Common Stock (MA) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	☑
Richard R Larsen IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen IRA ⇒ Microsoft Corporation (MSFT) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen IRA ⇒ Mondelez International, Inc. - Class A Common Stock (MDLZ) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	☑
Richard R Larsen IRA ⇒ Motorola Solutions, Inc. Common Stock (MSI) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Richard R Larsen IRA ⇒ Nasdaq, Inc. (NDAQ) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen IRA ⇒ NextEra Energy, Inc. (NEE) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen IRA ⇒ Paychex, Inc. - Common Stock (PAYX) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	☑
Richard R Larsen IRA ⇒ Pioneer Natural Resources Company (PXD) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1 - $1,000	Dividends	$1 - $200	☐
Richard R Larsen IRA ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		None	Dividends	$201 - $1,000	☑
Richard R Larsen IRA ⇒ ProLogis, Inc. (PLD) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen IRA ⇒ S&P Global Inc. Common Stock (SPGI) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	☑
Richard R Larsen IRA ⇒ Stryker Corporation (SYK) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets Dividend income reinvested into IRA asset		$1 - $1,000	Dividends	$1 - $200	☐
Richard R Larsen IRA ⇒ Target Corporation Common Stock (TGT) [ST] DESCRIPTION: Listing on FD23 to show I no longer hold this asset. It was sold on 10/05/23 and transaction was less than $1,000. I am reporting here to show its disposition per guidance from Committee		None	Dividends	$1 - $200	☐
Richard R Larsen IRA ⇒ The Hershey Company (HSY) [ST]		$1,001 - $15,000	Dividends	$1 - $200	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ TJX Companies, Inc. (TJX) [ST]		$1,001 - $15,000	Dividends	$1 - $200	☐
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		$1,001 - $15,000	Dividends	$1 - $200	☐
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		$1,001 - $15,000	Dividends	$1 - $200	☐
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Visa Inc. (V) [ST]		$1,001 - $15,000	Dividends	$1 - $200	☐
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Waste Management, Inc. (WM) [ST]		$1,001 - $15,000	Dividends	$1 - $200	☐
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen Roth IRA ⇒ Allspring Special Small Cap Value Fund Institutional Class (ESPNX) [MF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen Roth IRA ⇒ American Century Mid Cap Value Fund - I Class (AVUAX) [MF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen Roth IRA ⇒ Ameriprise Bank Insured Sweep Account [BA]		$1,001 - $15,000	Interest	$2.51	☐
Richard R Larsen Roth IRA ⇒ Artisan Small Cap Fund Inv Shs (ARTSX) [MF]		None	Dividends	$201 - $1,000	☑
Richard R Larsen Roth IRA ⇒ Delaware Small Cap Core Fund Institutional (DCCIX) [MF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen Roth IRA ⇒		$1,001 - $15,000	None		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Oberweis Small-Cap Opportunities Fund Institutional Class (OBSIX) [MF]					
Richard R Larsen Roth IRA ⇒ Value Line Mid Cap Focused Fund, Inc. Institutional Class (VLMIX) [MF]		$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen Roth IRA ⇒ Virtus KAR Mid-Cap Growth Fund I (PICMX) [MF]		$1,001 - $15,000	None		
Riversource indexed universal life insurance/S&P 500 Indexed Account [WU] Description: $350 monthly premium for life insurance totalling $4200 annually		$100,001 - $250,000	None		✓
Riversource RAVA 5 Advantage Variable Annuity/VP Moderate Portfolio Class 2 [MF] Description: Annuity that holds mutual fund. Retirement asset		$1,001 - $15,000	None		
Tiia Ingrid Karlen IRA ⇒ American Century Focused Dynamic Growth Fund - I Class (ACFSX) [MF]		$1,001 - $15,000	None		
Tiia Ingrid Karlen IRA ⇒ ClearBridge Select Fd I (LBFIX) [MF]		$1,001 - $15,000	None		
Tiia Ingrid Karlen IRA ⇒ Eaton Vance Emerging and Frontier Countries Equity Fund I (EICOX) [MF]		$1,001 - $15,000	None		✓
Tiia Ingrid Karlen IRA ⇒ Federated Hermes Kaufmann Small Cap Fund IS Shares (FKAIX) [MF]		None	Dividends	$201 - $1,000	✓
Tiia Ingrid Karlen IRA ⇒ Fidelity Advisor Growth Opportunities Fund: Class I (FAGCX) [MF]		$1,001 - $15,000	None		
Tiia Ingrid Karlen IRA ⇒ Fidelity Advisor International Small Cap Fund: Class I (FIXIX) [MF]		$1,001 - $15,000	None		
Tiia Ingrid Karlen IRA ⇒ Invesco Discovery Fund Class Y (ODIYX) [MF]		None	Dividends	$201 - $1,000	✓
Tiia Ingrid Karlen IRA ⇒ Invesco Global Opportunities Fund Class Y (OGIYX) [MF]		None	Dividends	$201 - $1,000	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Tiia Ingrid Karlen IRA ⇒ Oberweis Small-Cap Opportunities Fund Institutional Class (OBSIX) [MF]		$1,001 - $15,000	None		☑
Tiia Ingrid Karlen IRA ⇒ PGIM Jennison International Opportunities Fund Class Z (PWJZX) [MF]		$1,001 - $15,000	None		☑
Tiia Ingrid Karlen IRA ⇒ WCM Focused Emerging Markets Fund - Institutional Class (WCMEX) [MF]		None	Dividends	$201 - $1,000	☑
Tiia Ingrid Karlen Roth IRA ⇒ Ameriprise Insured Money Market Account [MF]		$1 - $1,000	None		☐
Tiia Ingrid Karlen Roth IRA ⇒ ClearBridge International Growth Fund Class I (LMGNX) [MF] DESCRIPTION: income reinvested back into asset		$1,001 - $15,000	Dividends	$1 - $200	☐
Tiia Ingrid Karlen Roth IRA ⇒ Fidelity Advisor International Small Cap Fund: Class I (FIXIX) [MF] DESCRIPTION: income reinvested back into asset		$1,001 - $15,000	Dividends	$1 - $200	☐
Tiia Ingrid Karlen Roth IRA ⇒ Invesco International Small-Mid Company Fund Class Y (OSMYX) [MF] DESCRIPTION: income reinvested into asset		$1,001 - $15,000	Dividends	$1 - $200	☐
Tiia Ingrid Karlen Roth IRA ⇒ Janus Henderson Global Equity Income Fund - I Shares (HFQIX) [MF]		None	Dividends	$201 - $1,000	☑
Tiia Ingrid Karlen Roth IRA ⇒ John Hancock Disciplined Value International Fund Class I (JDVIX) [MF] DESCRIPTION: income reinvested back into asset		$1,001 - $15,000	Dividends	$201 - $1,000	☑
Tiia Ingrid Karlen Roth IRA ⇒ PGIM Jennison International Opportunities Fund Class Z (PWJZX) [MF] DESCRIPTION: income reinvested back into asset		$1,001 - $15,000	Dividends	None	☐

* 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?
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ American Century Focused Dynamic Growth Fund - I Class (ACFSX) [MF]	JT	02/17/2023	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ American Century Small Cap Growth Fund - I Class (ANONX) [MF]	JT	02/17/2023	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Calvert Equity Fund Class I (CEYIX) [MF]	JT	02/17/2023	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ ClearBridge Select Fd I (LBFIX) [MF]	JT	02/17/2023	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Eaton Vance Emerging and Frontier Countries Equity Fund I (EICOX) [MF]	JT	08/22/2023	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Federated Hermes Kaufmann Small Cap Fund IS Shares (FKAIX) [MF]	JT	02/17/2023	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Federated Hermes Kaufmann Small Cap Fund IS Shares (FKAIX) [MF]	JT	10/25/2023	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Fidelity Advisor Growth Opportunities Fund: Class I (FAGCX) [MF]	JT	02/17/2023	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Fidelity Advisor International Growth Fund: Class I (FIIIX) [MF]	JT	02/17/2023	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒	JT	02/17/2023	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Fidelity Advisor International Small Cap Fund: Class I (FIXIX) [MF]					
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ JPMorgan Emerging Markets Equity Fund I Class (JEMSX) [MF]	JT	04/5/2023	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ JPMorgan Mid Cap Growth Fund I Class (HLGEX) [MF]	JT	02/17/2023	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ MFS Growth Fund Class I (MFEIX) [MF]	JT	02/17/2023	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Oberweis Small-Cap Opportunities Fund Institutional Class (OBSIX) [MF]	JT	10/25/2023	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ WCM Focused Emerging Markets Fund - Institutional Class (WCMEX) [MF]	JT	04/5/2023	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ WCM Focused Emerging Markets Fund - Institutional Class (WCMEX) [MF]	JT	08/22/2023	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Goldman Sachs Dynamic Municipal Income Fund - Investor Class (GUIRX) [MF]	JT	04/20/2023	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ MainStay MacKay Strategic Municipal Allocation Fund Class I (MTFGX) [MF]	JT	05/26/2023	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ MainStay MacKay Tax Free Bond Fund, Class I (MTBIX) [MF]	JT	05/26/2023	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Nuveen Strategic Municipal Opportunities Fund Class I (NSIOX) [MF]	JT	04/20/2023	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Abbott Laboratories (ABT) [ST] DESCRIPTION: This managed account within the RRL IRA was set up late 2020. At the time I received guidance that due to the account being one where i did not control selections or trades, I did not need to file PTRs. That guidance has since changed and am reporting per new guidance		01/6/2023	S	$1,001 - $15,000	☐
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Allstate Corporation (ALL) [ST] DESCRIPTION: sale of asset for IRA as part of periodic rebalancing. Transaction taken by advisor without my input per contract		07/5/2023	S	$1,001 - $15,000	☐
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Analog Devices, Inc. (ADI) [ST] DESCRIPTION: sale of asset for IRA as part of periodic rebalancing. Transaction taken by advisor without my input per contract		07/5/2023	S	$1,001 - $15,000	☐
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ BlackRock, Inc. (BLK) [ST] DESCRIPTION: This managed account within the RRL IRA was set up late 2020. At the time I received guidance that due to the account being one where i did not control selections or trades, I did not need to file PTRs. That guidance has since changed and am reporting per new guidance		01/6/2023	S	$1,001 - $15,000	☐
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Elevance Health, Inc. (ELV) [ST] DESCRIPTION: This managed account within the RRL IRA was set up late 2020. At the time I received guidance that due to the account being one where i did not control selections or trades, I did not need to file PTRs. That guidance has since changed and am reporting per new guidance		01/6/2023	P	$1,001 - $15,000	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Elevance Health, Inc. (ELV) [ST] DESCRIPTION: sale of asset for IRA as part of periodic rebalancing. Transaction taken by advisor without my input per contract		07/5/2023	S	$1,001 - $15,000	☐
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ General Dynamics Corporation (GD) [ST] DESCRIPTION: This managed account within the RRL IRA was set up late 2020. At the time I received guidance that due to the account being one where i did not control selections or trades, I did not need to file PTRs. That guidance has since changed and am reporting per new guidance		04/5/2023	P	$1,001 - $15,000	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Marsh & McLennan Companies, Inc. (MMC) [ST] DESCRIPTION: This managed account within the RRL IRA was set up late 2020. At the time I received guidance that due to the account being one where i did not control selections or trades, I did not need to file PTRs. That guidance has since changed and am reporting per new guidance		01/6/2023	P	$1,001 - $15,000	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Mastercard Incorporated (MA) [ST] DESCRIPTION: purchase of asset for IRA as part of periodic rebalancing. Transaction taken by advisor without my input per contract		07/5/2023	P	$1,001 - $15,000	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Mondelez International, Inc. - Class A (MDLZ) [ST] DESCRIPTION: Purchase of shares in RRL IRA portfolio as part of quarterly rebalancing of total RRL IRA portfolio.		10/4/2023	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Motorola Solutions, Inc. (MSI) [ST]		07/5/2023	P	$1,001 - $15,000	
Description: purchase of asset for IRA as part of periodic rebalancing. Transaction taken by advisor without my input per contract					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Paychex, Inc. (PAYX) [ST]		07/5/2023	P	$1,001 - $15,000	
Description: purchase of asset for IRA as part of periodic rebalancing. Transaction taken by advisor without my input per contract					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		07/5/2023	S	$1,001 - $15,000	☐
Description: sale of asset for IRA as part of periodic rebalancing. Transaction taken by advisor without my input per contract					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ S&P Global Inc. (SPGI) [ST]		07/5/2023	P	$1,001 - $15,000	
Description: purchase of asset for IRA as part of periodic rebalancing. Transaction taken by advisor without my input per contract					
Richard R Larsen Roth IRA ⇒ Artisan Small Cap Fund Inv Shs (ARTSX) [MF]		11/17/2023	S	$1,001 - $15,000	☐
Richard R Larsen Roth IRA ⇒ Oberweis Small-Cap Opportunities Fund Institutional Class (OBSIX) [MF]		11/17/2023	P	$1,001 - $15,000	
Riversource indexed universal life insurance/S&P 500 Indexed Account [WU]		Monthly	P	$350.00	
Tiia Ingrid Karlen IRA ⇒ Eaton Vance Emerging and Frontier Countries Equity Fund I (EICOX) [MF]		08/23/2023	P	$1,001 - $15,000	
Tiia Ingrid Karlen IRA ⇒ Federated Hermes Kaufmann Small Cap Fund IS Shares (FKAIX) [MF]		04/5/2023	P	$1,001 - $15,000	
Tiia Ingrid Karlen IRA ⇒ Federated Hermes Kaufmann Small Cap Fund IS Shares (FKAIX) [MF]		10/25/2023	S	$1,001 - $15,000	☐
Tiia Ingrid Karlen IRA ⇒ Invesco Discovery Fund Class Y (ODIYX) [MF]		04/5/2023	S	$1,001 - $15,000	☐
Tiia Ingrid Karlen IRA ⇒ Invesco Global Opportunities Fund Class Y (OGIYX) [MF]		02/17/2023	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Tiia Ingrid Karlen IRA ⇒ Oberweis Small-Cap Opportunities Fund Institutional Class (OBSIX) [MF]		10/25/2023	P	$1,001 - $15,000	
Tiia Ingrid Karlen IRA ⇒ PGIM Jennison International Opportunities Fund Class Z (PWJZX) [MF]		02/17/2023	P	$1,001 - $15,000	
Tiia Ingrid Karlen IRA ⇒ WCM Focused Emerging Markets Fund - Institutional Class (WCMEX) [MF]		08/23/2023	S	$1,001 - $15,000	☐
Tiia Ingrid Karlen Roth IRA ⇒ Janus Henderson Global Equity Income Fund - I Shares (HFQIX) [MF]		08/22/2023	S	$1,001 - $15,000	☐
Tiia Ingrid Karlen Roth IRA ⇒ Janus Henderson Global Equity Income Fund - I Shares (HFQIX) [MF]		08/22/2023	S	$1,001 - $15,000	☐
Tiia Ingrid Karlen Roth IRA ⇒ John Hancock Disciplined Value International Fund Class I (JDVIX) [MF]		08/22/2023	P	$1,001 - $15,000	
Tiia Ingrid Karlen Roth IRA ⇒ John Hancock Disciplined Value International Fund Class I (JDVIX) [MF]		08/22/2023	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	BAC Loans	December 2011	Mortgage for secondary residence	$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

Trip Details					Inclusions		
Source	**Start Date**	**End Date**	**Itinerary**	**Days at Own Exp.**	**Lodging?**	**Food?**	**Family?**
Aspen Institute	02/21/2023	02/25/2023	Washington DC - Cartagena, Colombia - Washington DC	0	☑	☑	☑
Aspen Institute	04/10/2023	04/15/2023	Washington DC - Bellagio, Italy - Washington, DC	0	☑	☑	☐
Aspen Institute	08/23/2023	09/1/2023	Seattle, WA - Copenhagen, Denmark - Oslo, Norway - Bergen, Norway - Seattle, WA	3	☑	☑	☑
Singapore Ministry of Foreign Affairs	07/30/2023	08/4/2023	Seattle, WA - Singapore - Seattle, WA	0	☑	☑	☐

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

- Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 (Owner: JT)
  Description: Created Revocable Living Trust on March 18, 2018.
- Richard R Larsen and Tiia I Karlen Revocable Trust (Owner: JT)
- Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 (Owner: JT)
- Richard R Larsen IRA
- Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account
- Richard R Larsen Roth IRA
- Tiia Ingrid Karlen IRA
- Tiia Ingrid Karlen Roth IRA

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. Rick Larsen , 06/13/2024