



Filing ID #10057540

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Yadira Caraveo
Status: Member
State/District: CO08

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/14/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Acorns Account ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Chase bank accounts [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Invesco IRA ⇒ Invesco U.S. Government Money Portfolio Cash Reserve (GMQXX) [MF] DESCRIPTION: Mutual fund in a rollover IRA account with Invesco.		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Peak Pediatrics 401K ⇒ Transamerica LifeGoal 2045 with BlackRock Ret Acct [EF] DESCRIPTION: The Transamerica LifeGoal 2045 with BlackRock Ret Acct is a Separate Sub-Account maintained by TFLIC and invests exclusively in the Transamerica LifeGoal 2045 with BlackRock Ret Opt, a Transamerica Life Insurance Company (TLIC) Separate Account. The TLIC Separate Account invests exclusively in the Transamerica LifeGoal(SM) 2045 Fund, a collective investment trust fund. Prior to 11/20/2020 this Separate Account was named the TA BlackRock Lifepath Index 2045 Ret Acct.		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Rental Property [RP] LOCATION: Albuquerque, NM, US DESCRIPTION: Residential rental property located in Albuquerque, NM.		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Securian Minnesota Life Variable Universal Life Insurance		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Policy ⇒ Capital World Bond Fund, Class A Shares (CWBFX) [MF]					<input type="checkbox"/>
Securian Minnesota Life Variable Universal Life Insurance Policy ⇒ Delaware Ivy VIP Asset Strategy [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Securian Minnesota Life Variable Universal Life Insurance Policy ⇒ Morgan Stanley VIF Emerging Markets Equity Portfolio [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Securian Minnesota Life Variable Universal Life Insurance Policy ⇒ SFT Index 400 Mid-Cap Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Securian Minnesota Life Variable Universal Life Insurance Policy ⇒ SFT Real Estate Securities Fund Class 1 [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Securian Minnesota Life Variable Universal Life Insurance Policy ⇒ Vanguard Capital Growth [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Securian Minnesota Life Variable Universal Life Insurance Policy ⇒ Vanguard Equity Income [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Securian Minnesota Life Variable Universal Life Insurance Policy ⇒ Vanguard International [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Securian Minnesota Life Variable Universal Life Insurance Policy ⇒ Vanguard Small Company Growth [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Securian Minnesota Life Variable Universal Life Insurance Policy ⇒ Vanguard Total Bond Market [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Securian Minnesota Life Variable Universal Life Insurance Policy 2 ⇒ SFT Equity Stabilization Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Securian Roth IRA ⇒ American Funds Fundamental Investors Class A [MF]		\$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?
Securian Minnesota Life Variable Universal Life Insurance Policy ⇒ Capital World Bond Fund, Class A Shares (CWBFX) [MF]		12/8/2023	P	\$1,001 - \$15,000	
Securian Minnesota Life Variable Universal Life Insurance Policy ⇒ SFT International Bond Fund Class 1 [OT]		12/8/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US					
DESCRIPTION: Mutual fund; liquidated in December 2023					

* 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
	Fedloan	July 2021	Student loan	\$250,001 - \$500,000
	Mr. Cooper	March 2017	Mortgage on Albuquerque, NM property	\$100,001 - \$250,000
	BOK Financial	September 2021	Mortgage on personal residence	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2022	Peak Pediatrics and Self	Leave of absence during government service.

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?
American Israel Education Foundation Inc.	08/5/2023	08/13/2023	Denver, CO - Jerusalem, Israel - Tiberias, Israel - Denver, CO	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">Acorns Account LOCATION: USInvesco IRAPeak Pediatrics 401KSecurian Minnesota Life Variable Universal Life Insurance PolicySecurian Minnesota Life Variable Universal Life Insurance Policy 2Securian Roth IRA
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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. Yadira Caraveo , 05/14/2024