



Filing ID #10057570

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Gerald E. Connolly
Status: Member
State/District: VA11

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/10/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Congressional Federal Credit Union [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Fairfax County Retirement Fund Employee Plan BG - not self-directed [DB]		Undetermined	None		<input type="checkbox"/>
Met Life Insurance Policy Cash Value [WU]	SP	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Met Life Insurance Policy Cash Value [WU]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Met Life Insurance Policy Cash Value [WU]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
TIAA CREF - Self ⇒ TIAA Cref Traditional Retirement [FN]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Self ⇒ Calvert Bond Fund [MF]		\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ DFA Emerging Markets Social Core Equity Portfolio [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA IRA - Self ⇒ DFA International Social Core Equity Portfolio [MF]		\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ DFA US Social Core Equity 2 Portfolio [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ MFS International New Discovery Fund [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ Nushares Etf Trust [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Self ⇒ Nuveen Core Impact Bond Fund R6 (TSBIX) [MF]		\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ Nuveen ESG Mid-Cap Value ETF [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ Nuveen ESG Small-Cap ETF (NUSC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ Nuveen High Yield Fund R6 (TIHYX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ Nuveen Large Cap Responsible Equity Fund R6 (TISCX) [MF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ Nuveen Short Term Bond Fund R6 (TISIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ Parnassus Core Equity Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ PGIM High Yield Fund Class R6 (PHYQX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ PIMCO Emerging Markets Local Currency and Bond Fund [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA IRA - Self ⇒ TIAA Cash Accounts [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Self ⇒ Vanguard Short-Term Bond Index Fund [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ Vanguard Small Cap ETF [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Spouse ⇒ Calvert Bond Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Spouse ⇒ DFA Emerging Markets Social Core Equity Portfolio [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ DFA International Social Core Equity Portfolio [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Spouse ⇒ DFA US Social Core Equity 2 Portfolio [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ iShares Core S&P Small-Cap LCap 600 Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ MFS International New Discovery Fund [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Spouse ⇒ Nushares Etf Trust [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ Nuveen Core Impact Bond Fund R6 (TSBIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Spouse ⇒ Nuveen ESG Mid-Cap Value ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ Nuveen High Yield Fund R6 (TIHYX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Spouse ⇒ Nuveen Large Cap Responsible Equity Fund R6 (TISCX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Spouse ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Nuveen Short Term Bond Fund R6 (TISIX) [MF]					
TIAA IRA - Spouse ⇒ Parnassus Core Equity Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Spouse ⇒ PGIM High Yield Fund Class R6 (PHYQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Spouse ⇒ PIMCO Emerging Markets Local Currency and Bond Fund [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Spouse ⇒ TIAA Cash Accounts [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA IRA - Spouse ⇒ Vanguard Short-Term Bond Index Fund [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA IRA - Spouse ⇒ Vanguard Small Cap ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA Joint ⇒ AB High Income Municipal Bond Portfolio [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Allspring Municipal Bond Fund [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Baird Short-Term Municipal Bond Fund [MF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Bristol-Myers Squibb Company (BMY) [ST]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
TIAA Joint ⇒ Coca-Cola Company (KO) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
TIAA Joint ⇒ Dominion Energy, Inc. (D) [ST]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ iShares Trust iShares ESG Aware MSCI EAFE ETF [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TIAA Joint ⇒ Leidos Holdings, Inc. (LDOS) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA Joint ⇒ Mainstay MacKay Tax Free Bond Fund [MF]	JT	None	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
TIAA Joint ⇒ Nuveen ESG International Developed Markets Equity ETF (NUDM) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TIAA Joint ⇒ Nuveen ESG Large-Cap Growth ETF (NULG) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Nuveen ESG Large-Cap Value ETF [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Nuveen Flagship Limited Term Municipal Bond Fd Cl R Shs (FLTRX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Nuveen Intermediate Duration Municipal Bond Fund [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Nuveen Virginia TF Value Fund Cl R (NMVAX) [MF]	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Organon & Co. (OGN) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TIAA Joint ⇒ PIMCO Emerging Markets Local Currency and Bond Fund [MF]	JT	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Procter & Gamble Company (PG) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
TIAA Joint ⇒ SCIENCE APPLICATIONS INTERNATIONAL CORPORATION (SAIC) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ TIAA Cash Deposit Accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
TIAA Joint ⇒	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard High-Yield Corporate Fund Admiral Shares (VWEAX) [MF]					
TIAA Joint ⇒ Walt Disney Company (DIS) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
TIAA Joint ⇒ Wells Fargo & Company (WFC) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TIAA Joint ⇒ Zimmer Biomet Holdings, Inc. (ZBH) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Truist [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Truist Money Market - Federated Virginia Municipal Cash TR SS [BA]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
United Bank [BA]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
US Senate Federal Credit Union Savings Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<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?
TIAA CREF - Spouse ⇒ MFS International New Discovery Fund Class R6 (MIDLX) [MF]	SP	03/17/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA CREF - Spouse ⇒ PIMCO Emerging Markets Local Currency and Bond Fund Institutional Class (PELBX) [MF]	SP	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ Calvert Bond Fund Class R6 (CBORX) [MF]		03/29/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ Calvert Bond Fund Class R6 (CBORX) [MF]		08/15/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA IRA - Self ⇒ Calvert Bond Fund Class R6 (CBORX) [MF]		12/13/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ DFA Emerging Markets Social Core Equity Portfolio (DFESX) [MF]		12/13/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ DFA International Social Core Equity Portfolio Instl Class (DSCLX) [MF]		03/17/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ DFA International Social Core Equity Portfolio Instl Class (DSCLX) [MF]		03/29/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ DFA International Social Core Equity Portfolio Instl Class (DSCLX) [MF]		08/15/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ DFA U.S. Social Core Equity 2 Portfolio (DFUEX) [MF]		08/15/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		08/15/2023	P	\$15,001 - \$50,000	
TIAA IRA - Self ⇒ MFS International New Discovery Fund Class R6 (MIDLX) [MF]		03/17/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ Nuveen Core Impact Bond Fund R6 (TSBIX) [MF]		03/29/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ Nuveen Core Impact Bond Fund R6 (TSBIX) [MF]		08/15/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ Nuveen Core Impact Bond Fund R6 (TSBIX) [MF]		12/13/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ Nuveen ESG Mid-Cap Value ETF (NUMV) [EF]		03/29/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ Nuveen ESG Small-Cap ETF (NUSC) [EF]		08/15/2023	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA IRA - Self ⇒ Nuveen High Yield Fund R6 (TIHYX) [MF]		03/29/2023	P	\$15,001 - \$50,000	
TIAA IRA - Self ⇒ Nuveen High Yield Fund R6 (TIHYX) [MF]		11/13/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ Nuveen Large Cap Responsible Equity Fund R6 (TISCX) [MF]		03/17/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ Nuveen Large Cap Responsible Equity Fund R6 (TISCX) [MF]		08/15/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ Nuveen Large Cap Responsible Equity Fund R6 (TISCX) [MF]		11/13/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ Nuveen Short Term Bond Fund R6 (TISIX) [MF]		03/29/2023	P	\$15,001 - \$50,000	
TIAA IRA - Self ⇒ Nuveen Short Term Bond Fund R6 (TISIX) [MF]		12/13/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		03/17/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		08/15/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		11/13/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		11/28/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		12/13/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ PGIM High Yield Fund Class R6 (PHYQX) [MF]		11/13/2023	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA IRA - Self ⇒ PIMCO Emerging Markets Local Currency and Bond Fund Institutional Class (PELBX) [MF]		03/17/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
TIAA IRA - Self ⇒ Vanguard Index Trust Small-Cap Index Fund Instl Shares (VSCIX) [MF]		03/29/2023	P	\$1,001 - \$15,000	
TIAA IRA - Self ⇒ Vanguard Index Trust Small-Cap Index Fund Instl Shares (VSCIX) [MF]		08/15/2023	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
TIAA IRA - Self ⇒ Vanguard Short-Term Bond Index Fund Admiral Shares (VBIRX) [MF]		03/29/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
TIAA IRA - Spouse ⇒ Calvert Bond Fund Class R6 (CBORX) [MF]	SP	03/29/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA IRA - Spouse ⇒ DFA International Social Core Equity Portfolio Instl Class (DSCLX) [MF]	SP	03/17/2023	P	\$1,001 - \$15,000	
TIAA IRA - Spouse ⇒ Nuveen Core Impact Bond Fund R6 (TSBIX) [MF]	SP	03/29/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA IRA - Spouse ⇒ Nuveen Core Impact Bond Fund R6 (TSBIX) [MF]	SP	08/15/2023	P	\$1,001 - \$15,000	
TIAA IRA - Spouse ⇒ Nuveen High Yield Fund R6 (TIHYX) [MF]	SP	03/29/2023	P	\$1,001 - \$15,000	
TIAA IRA - Spouse ⇒ Nuveen High Yield Fund R6 (TIHYX) [MF]	SP	11/13/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA IRA - Spouse ⇒ Nuveen Large Cap Responsible Equity Fund R6 (TISCX) [MF]	SP	12/13/2023	P	\$1,001 - \$15,000	
TIAA IRA - Spouse ⇒ Nuveen Large Cap Responsible Equity Fund R6 (TISCX) [MF]	SP	03/17/2023	P	\$1,001 - \$15,000	
TIAA IRA - Spouse ⇒ Nuveen Short Term Bond Fund R6 (TISIX) [MF]	SP	03/29/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA IRA - Spouse ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]	SP	03/17/2023	P	\$1,001 - \$15,000	
TIAA IRA - Spouse ⇒ PGIM High Yield Fund Class R6 (PHYQX) [MF]	SP	11/13/2023	P	\$1,001 - \$15,000	
TIAA IRA - Spouse ⇒ Vanguard Short-Term Bond Index Fund Admiral Shares (VBIRX) [MF]	SP	03/29/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA Joint ⇒ AB Municipal Income Fund, Inc. - AB High Income Municipal Portfolio - Z (ABTZX) [MF]	JT	03/29/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
TIAA Joint ⇒ AB Municipal Income Fund, Inc. - AB High Income Municipal Portfolio - Z (ABTZX) [MF]	JT	10/11/2023	P	\$15,001 - \$50,000	
TIAA Joint ⇒ Allspring Municipal Bond Fund Class R6 (WMBRX) [MF]	JT	03/29/2023	P	\$15,001 - \$50,000	
TIAA Joint ⇒ Allspring Municipal Bond Fund Class R6 (WMBRX) [MF]	JT	08/15/2023	P	\$1,001 - \$15,000	
TIAA Joint ⇒ Allspring Municipal Bond Fund Class R6 (WMBRX) [MF]	JT	10/11/2023	P	\$50,001 - \$100,000	
TIAA Joint ⇒ Allspring Municipal Bond Fund Class R6 (WMBRX) [MF]	JT	11/13/2023	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
TIAA Joint ⇒ Baird Short-Term Municipal Bond Fund - Institutional Class (BTMIX) [MF]	JT	03/29/2023	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Baird Short-Term Municipal Bond Fund - Institutional Class (BTMIX) [MF]	JT	08/15/2023	P	\$1,001 - \$15,000	
TIAA Joint ⇒ Baird Short-Term Municipal Bond Fund - Institutional Class (BTMIX) [MF]	JT	10/11/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
TIAA Joint ⇒ Dominion Energy, Inc. (D) [ST]	JT	03/29/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA Joint ⇒ Dominion Energy, Inc. (D) [ST]	JT	08/15/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Dominion Energy, Inc. (D) [ST]	JT	11/13/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Leidos Holdings, Inc. (LDOS) [ST]	JT	03/29/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Leidos Holdings, Inc. (LDOS) [ST]	JT	08/15/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Leidos Holdings, Inc. (LDOS) [ST]	JT	11/13/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ MainStay MacKay Tax Free Bond Fund Class R6 (MTBDX) [MF]	JT	08/15/2023	S	\$100,001 - \$250,000	<input type="checkbox"/>
TIAA Joint ⇒ MainStay MacKay Tax Free Bond Fund Class R6 (MTBDX) [MF]	JT	10/11/2023	P	\$100,001 - \$250,000	
TIAA Joint ⇒ MainStay MacKay Tax Free Bond Fund Class R6 (MTBDX) [MF]	JT	11/13/2023	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Nuveen ESG Large-Cap Growth ETF (NULG) [EF]	JT	11/13/2023	P	\$1,001 - \$15,000	
TIAA Joint ⇒ Nuveen ESG Large-Cap Value ETF (NULV) [EF]	JT	11/13/2023	P	\$1,001 - \$15,000	
TIAA Joint ⇒ Nuveen Flagship LA Muni Bd Fd Cl R (FTLRX) [MF]	JT	10/11/2023	P	\$15,001 - \$50,000	
TIAA Joint ⇒ Nuveen Flagship Limited Term Municipal Bond Fd Cl R Shs (FLTRX) [MF]	JT	08/15/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
TIAA Joint ⇒ Nuveen Intermediate Duration Municipal Bond Fund Class R (NUVBX) [MF]	JT	03/29/2023	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA Joint ⇒ Nuveen Intermediate Duration Municipal Bond Fund Class R (NUVBX) [MF]	JT	08/15/2023	P	\$1,001 - \$15,000	
TIAA Joint ⇒ Nuveen Intermediate Duration Municipal Bond Fund Class R (NUVBX) [MF]	JT	10/11/2023	P	\$50,001 - \$100,000	
TIAA Joint ⇒ Nuveen Intermediate Duration Municipal Bond Fund Class R (NUVBX) [MF]	JT	11/13/2023	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
TIAA Joint ⇒ Nuveen Virginia TF Value Fund Cl R (NMVAX) [MF]	JT	03/29/2023	P	\$100,001 - \$250,000	
TIAA Joint ⇒ Nuveen Virginia TF Value Fund Cl R (NMVAX) [MF]	JT	08/15/2023	P	\$100,001 - \$250,000	
TIAA Joint ⇒ Nuveen Virginia TF Value Fund Cl R (NMVAX) [MF]	JT	10/11/2023	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>
TIAA Joint ⇒ Nuveen Virginia TF Value Fund Cl R (NMVAX) [MF]	JT	11/13/2023	P	\$250,001 - \$500,000	
TIAA Joint ⇒ PIMCO Emerging Markets Local Currency and Bond Fund Institutional Class (PELBX) [MF]	JT	03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA Joint ⇒ SCIENCE APPLICATIONS INTERNATIONAL CORPORATION (SAIC) [ST]	JT	03/29/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ SCIENCE APPLICATIONS INTERNATIONAL CORPORATION (SAIC) [ST]	JT	08/15/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ SCIENCE APPLICATIONS INTERNATIONAL CORPORATION (SAIC) [ST]	JT	11/13/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TIAA Joint ⇒ Vanguard High-Yield Corporate Fund Admiral Shares (VWEAX) [MF]	JT	03/29/2023	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA Joint ⇒ Vanguard High-Yield Corporate Fund Admiral Shares (VWEAX) [MF]	JT	10/11/2023	S	\$15,001 - \$50,000	<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 C: EARNED INCOME

Source	Type	Amount
Long and Foster	Spouse Commissions	N/A
Fairfax County Retirement Fund	Required Defined Benefit Distribution	\$18,757.62
TIAA IRA SEP	Required Minimum Distribution - Self	\$6,130.51
TIAA Retirement Trust	Required Minimum Distribution - Self	\$57,569.00
TIAA Retirement Trust	Required Minimum Distribution - Spouse	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America	Spring 2006	Mortgage on Primary Residence	\$50,001 - \$100,000
	Nelnet	August 2010	Student Loan	\$10,000 - \$15,000
	Nelnet	August 2011	Student Loan	\$15,001 - \$50,000
	Nelnet	August 2012	Student Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
1995	Fairfax County Retirement Fund Employee Plan B	Defined benefit plan managed entirely by the County

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

- TIAA CREF - Self
- TIAA CREF - Spouse (Owner: SP)
- TIAA IRA - Self
- TIAA IRA - Spouse (Owner: SP)
- TIAA Joint (Owner: JT)

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. Gerald E. Connolly , 05/10/2024