



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Stephen F. Lynch
Status: Member
State/District: MA08

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?
3 Jason Terrace [RP] LOCATION: Boston, MA, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Bank of America [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
IRA ⇒ Cisco Systems, Inc. (CSCO) [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Dell Technologies Inc. Class V (DVMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Intel Corporation (INTC) [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Morgan Stanley Institutional Fund Growth Portfolio [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Morgan Stanley Money Market Fund [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Pioneer Equity Income Fund [IH]					<input type="checkbox"/>
IRA ⇒ Pioneer Mid-Cap Growth Fund [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rockland Trust [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
South Boston Community Health Center 403(b) ⇒ American Funds Euro-Pacific [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
South Boston Community Health Center 403(b) ⇒ American Funds Income Fund of America [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
South Boston Community Health Center 403(b) ⇒ Federated Kaufman Small Cap A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
South Boston Community Health Center 403(b) ⇒ Fidelity Balanced Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
South Boston Community Health Center 403(b) ⇒ Fidelity Contra Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
South Boston Community Health Center 403(b) ⇒ Fidelity Emerging Markets [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?
IRA ⇒ Vmware, Inc. Common stock, Class A (VMW) [ST]		11/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: On November 27, 2023 Broadcom Inc. (NASDAQ: AVGO), a global technology leader that designs, develops, and supplies semiconductor and infrastructure software solutions, acquired VMware, Inc.					

* 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
South Boston Community Health Center	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Rockland Trust	2011	Mortgage on Primary Residence	\$250,001 - \$500,000
JT	Quicken Loans	2019	Mortgage on Rental Property	\$250,001 - \$500,000
JT	Congressional Federal Credit Union	November 2008	Home Equity Line of Credit	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Advisory Board	Edgerley Family South Boston Boys & Girls Club
COMMENTS: The Advisory Board position is uncompensated	

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

- IRA
- South Boston Community Health Center 403(b)
LOCATION: US

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

COMMENTS

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. Stephen F. Lynch , 05/10/2024