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Financial Disclosure Report

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Filer Information

Name: Hon. Kim Dr Schrier
Status: Member
State/District: WA08

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?
Commonspirit 401(k) with Franciscan Health ⇒ Fidelity Cash Reserves (FDRXX) [MF] Description: Fidelity Government Cash Reserves		$1,001 - $15,000	Tax-Deferred		☐
Commonspirit 401(k) with Franciscan Health ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		$1 - $1,000	Tax-Deferred		☐
Commonspirit 401(k) with Franciscan Health ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		$100,001 - $250,000	Tax-Deferred		☐
Commonspirit 401(k) with Franciscan Health ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]		$15,001 - $50,000	Tax-Deferred		☑
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		$100,001 - $250,000	Tax-Deferred		☑
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		$50,001 - $100,000	Tax-Deferred		☐
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		$1 - $1,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
David's IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
David's IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
David's IRA ⇒ Money Market [BA]	SP	$1,001 - $15,000	Tax-Deferred		☐
David's IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	SP	$500,001 - $1,000,000	Tax-Deferred		☐
David's IRA ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☐
David's IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
David's IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Erisa 403b with Franciscan Health ⇒ Fidelity Cash Reserves (FDRXX) [MF] Description: Fidelity Cash Reserves		$1 - $1,000	Tax-Deferred		☐
Erisa 403b with Franciscan Health ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]		$100,001 - $250,000	Tax-Deferred		☐
Erisa 403b with Franciscan Health ⇒ Vanguard Developed Markets Index Admiral (VTMGX) [MF]		$100,001 - $250,000	Tax-Deferred		☑
Erisa 403b with Franciscan Health ⇒ Vanguard Intermediate-Term Investment Grade Fund Admiral Shrs (VFIDX) [MF]		$15,001 - $50,000	Tax-Deferred		☐
Erisa 403b with Franciscan Health ⇒ Vanguard Small-Cap Growth Index Fd Admiral (VSGAX) [MF]		$50,001 - $100,000	Tax-Deferred		☐
Inherited IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	JT	$50,001 - $100,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Inherited IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	JT	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ T.D Ameritrade - Cash [BA]	JT	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]	JT	$50,001 - $100,000	Tax-Deferred		☑
Inherited IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	JT	$100,001 - $250,000	Tax-Deferred		☐
Inherited IRA ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	JT	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	JT	$15,001 - $50,000	Tax-Deferred		☐
Kim's 403b - Pre-2009 ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		$100,001 - $250,000	Tax-Deferred		☐
Kim's 403b - Pre-2009 ⇒ Fidelity International Index Fund (FSPSX) [MF]		$100,001 - $250,000	Tax-Deferred		☐
Kim's 403b - Pre-2009 ⇒ Fidelity U.S. Bond Index Fund (FXNAX) [MF]		$50,001 - $100,000	Tax-Deferred		☐
Kim's Roth IRA - 2014 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		$50,001 - $100,000	Tax-Deferred		☑
Kim's Roth IRA - 2014 ⇒ Money Market [BA]		$1,001 - $15,000	Tax-Deferred		☐
Kim's Roth IRA - 2014 ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		$15,001 - $50,000	Tax-Deferred		☐
Samuel Gowing Trust ⇒ DFA International Social Core Equity Portfolio Instl Class (DSCLX) [MF]		$50,001 - $100,000	Dividends	$1,001 - $2,500	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Samuel Gowing Trust ⇒ FDIC Insured Deposit Account [BA]		$1,001 - $15,000	None		☐
Samuel Gowing Trust ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		$1,001 - $15,000	None		☑
Samuel Gowing Trust ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		$15,001 - $50,000	Dividends	$201 - $1,000	☐
Samuel Gowing Trust ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Samuel Gowing Trust ⇒ SPDR Portfolio Aggregate Bond ETF (SPAB) [EF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Samuel Gowing Trust ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		$15,001 - $50,000	Dividends	$201 - $1,000	☐
Samuel Gowing Trust ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		$50,001 - $100,000	Dividends	$1,001 - $2,500	☑
Samuel Gowing Trust ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Samuel Gowing Trust ⇒ Vanguard Real Estate ETF (VNQ) [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	☐
Samuel Gowing Trust ⇒ Vanguard Total Bond Market ETF (BND) [EF]		$1,001 - $15,000	None		☑
Stanford Health Care Retirement Savings Plan ⇒ Fidelity Freedom Index 2030 Fund - Institutional Premium Class (FFEGX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
The Gowing Schrier Qualified Blind Trust [EQ]	JT	$5,000,001 - $25,000,000	QBT Income	$50,001 - $100,000	☐
Wells Fargo - Checking [BA]	JT	$50,001 - $100,000	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?
Commonspirit 401(k) with Franciscan Health ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]		04/26/2023	P	$15,001 - $50,000	
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		06/22/2023	P	$1,001 - $15,000	
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		10/17/2023	P	$1,001 - $15,000	
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		12/20/2023	P	$1,001 - $15,000	
David's IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	05/1/2023	P	$1,001 - $15,000	
David's IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	10/10/2023	P	$1,001 - $15,000	
David's IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	04/26/2023	P	$15,001 - $50,000	
David's IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	SP	04/26/2023	P	$15,001 - $50,000	
David's IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	01/12/2023	P	$1,001 - $15,000	
David's IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	04/26/2023	P	$100,001 - $250,000	
David's IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	07/18/2023	P	$1,001 - $15,000	
Erisa 403b with Franciscan Health ⇒ Vanguard Developed Markets Index Admiral (VTMGX) [MF]		12/15/2023	P	$1,001 - $15,000	
Inherited IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	JT	01/12/2023	P	$1,001 - $15,000	
Inherited IRA ⇒	JT	09/13/2023	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Vanguard ESG International Stock ETF (VSGX) [EF]					
Kim's Roth IRA - 2014 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		01/12/2023	P	$1,001 - $15,000	
Samuel Gowing Trust ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		12/19/2023	S (partial)	$1,001 - $15,000	☐
Samuel Gowing Trust ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		10/25/2023	S (partial)	$1,001 - $15,000	☐
Samuel Gowing Trust ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		11/2/2023	S (partial)	$1,001 - $15,000	☐
Samuel Gowing Trust ⇒ Vanguard Total Bond Market ETF (BND) [EF]		01/12/2023	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

None disclosed.

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
October 2017	Kim Schrier and Franciscan Health	Ongoing leave of absence.
Comments: Formerly Virginia Mason Medical Center		
October 2017	Filer and Franciscan Health - 401(k) Plan	Defined contribution plan that provides service retirement benefits.
Comments: Previously managed by Virginia Mason Medical Center - 401(a) Plan		
October 2017	Filer and Franciscan Health - 403(b) Plan	Defined contribution plan that provides service retirement benefits.
Comments: Previously managed by Virginia Mason Medical Center - 403 (b) Plan		

June 2000	Filer and Stanford Health Care Retirement Savings Plan	Defined contribution plan that provides service retirement benefits.

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	08/26/2023	09/1/2023	Seattle, WA - Oslo, Norway - Seattle, WA	0	☑	☑	☐
J Street Education Fund	02/17/2023	02/24/2023	Seattle, WA - Israel - Seattle, WA	0	☑	☑	☑

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

- Commonspirit 401(k) with Franciscan Health
  DESCRIPTION: Previously reported as Kim’s 401(a) with VMMC
- David's IRA (Owner: SP)
- Erisa 403b with Franciscan Health
  DESCRIPTION: Previously reported as Kim's 403b with VMMC
- Inherited IRA (Owner: JT)
  DESCRIPTION: Inherited in October, 2021.
- Kim's 403b - Pre-2009
- Kim's Roth IRA - 2014
- Samuel Gowing Trust
  DESCRIPTION: Trust for son's education
- Stanford Health Care Retirement Savings Plan
  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. Kim Dr Schrier , 05/10/2024