Filing ID #10058971

Financial Disclosure Report

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

Filer Information

Name: Hon. Josh Harder
Status: Member
State/District: CA09

Filing Information

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/15/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Alex Brown Raymond James brokerage ⇒ Okta, Inc. - Class A (OKTA) [ST]		$15,001 - $50,000	None		☐
Alex Brown Raymond James brokerage ⇒ Rocket Lab USA, Inc. (RKLB) [ST] Comments: No transactions >$1,000; asset transferred from BVA fund.		$1,001 - $15,000	None		☐
Bank of America Checking Account [BA]	JT	$15,001 - $50,000	None		☐
Bessemer Venture Associates IX L.P. Fund [HE]		$15,001 - $50,000	Partnership income	$15,001 - $50,000	☐
Bessemer Venture Associates VIII L.P. Fund [HE]		$1,001 - $15,000	Partnership income	$5,001 - $15,000	☐
Betterment Retirement Account ⇒ iShares Core MSCI EAFE ETF [EF]		$15,001 - $50,000	Dividends	$1,001 - $2,500	☐
Betterment Retirement Account ⇒ iShares Core MSCI Emerging Markets ETF [EF]		$15,001 - $50,000	Dividends	$1,001 - $2,500	☐
Betterment Retirement Account ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT)		$1,001 - $15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
[EF]					
Betterment Retirement Account ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		$1,001 - $15,000	None		☐
Betterment Retirement Account ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]		$1,001 - $15,000	None		☐
Betterment Retirement Account ⇒ iShares National Muni Bond ETF [EF]		$1,001 - $15,000	None		☑
Betterment Retirement Account ⇒ iShares Russell 2000 Value ETF (IWN) [EF]		$1,001 - $15,000	None		☐
Betterment Retirement Account ⇒ iShares Russell Mid-cap Value ETF [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	☐
Betterment Retirement Account ⇒ Schwab International Equity ETF [EF]		$15,001 - $50,000	Dividends	$201 - $1,000	☐
Betterment Retirement Account ⇒ Schwab U.S. Broad Market ETF [EF]		$15,001 - $50,000	Dividends	$1,001 - $2,500	☐
Betterment Retirement Account ⇒ SPDR Nuveen Bloomberg Barclays Municipal Bond ETF [EF]		$1,001 - $15,000	None		☑
Betterment Retirement Account ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		$1,001 - $15,000	None		☐
Betterment Retirement Account ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		$1,001 - $15,000	None		☐
Betterment Retirement Account ⇒ Vanguard Mid-Cap Value ETF [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	☐
Betterment Retirement Account ⇒ Vanguard Small-Cap Value ETF [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	☐
Betterment Retirement Account ⇒ Vanguard Total International Bond ETF [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	☐
Betterment Retirement Account ⇒		$1,001 - $15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Vanguard Total Stock Market ETF (VTI) [EF]					
Betterment Retirement Account ⇒ Vanguard Value ETF (VTV) [EF]		$1,001 - $15,000	Dividends	$201 - $1,000	
Betterment Traditional IRA ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		$1,001 - $15,000	None		
Betterment Traditional IRA ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]		$1,001 - $15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		$15,001 - $50,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		$1,001 - $15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]		$1,001 - $15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Short-Term Inflation-Protected Securities Index Fund [EF]		$1 - $1,000	None		
Betterment Traditional IRA ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]		$1,001 - $15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]		$1,001 - $15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF]		$1,001 - $15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		$15,001 - $50,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Value ETF (VTV) [EF]		$1,001 - $15,000	Tax-Deferred		
Charles Schwab Investment Account ⇒ SPDR S&P 500 ETF [EF]	SP	$1,000,001 - $5,000,000	Dividends	$15,001 - $50,000	
Charles Schwab Investment Account ⇒	SP	$500,001 -	Dividends	$5,001 -	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
SPDR S&P MIDCAP 400 ETF [EF]		$1,000,000		$15,000	☐
Charles Schwab Investment Account ⇒ Vanguard Growth ETF (VUG) [EF]	SP	$1,001 - $15,000	None		☑
Charles Schwab Rollover IRA ⇒ Vanguard Growth ETF (VUG) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Charles Schwab Roth IRA ⇒ SPDR S&P 500 ETF (SPY) [EF]	SP	$100,001 - $250,000	Tax-Deferred		☐
Charles Schwab Roth IRA ⇒ SPDR S&P MIDCAP 400 ETF (MDY) [EF]	SP	$50,001 - $100,000	Tax-Deferred		☐
Charles Schwab Roth IRA ⇒ Vanguard Growth ETF (VUG) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Merrill Investment Account ⇒ ACV Auctions Inc. - Class A (ACVA) [ST]		$15,001 - $50,000	None		☐
Merrill Investment Account ⇒ Cash [BA]		$1,001 - $15,000	None		☐
Merrill Investment Account ⇒ PagerDuty, Inc. (PD) [ST]		$1,001 - $15,000	None		☐
Merrill Investment Account ⇒ Procore Technologies, Inc. Common Stock (PCOR) [ST]		$1,001 - $15,000	None		☐
Merrill Investment Account ⇒ Toast, Inc. Class A (TOST) [ST] COMMENTS: No transactions >$1,000; asset transferred from BVA fund.		$1,001 - $15,000	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?
Betterment Retirement Account ⇒ iShares National Muni Bond ETF (MUB) [EF]		09/11/2023	S (partial)	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Betterment Retirement Account ⇒ iShares National Muni Bond ETF (MUB) [EF]		09/21/2023	S (partial)	$1,001 - $15,000	☐
Betterment Retirement Account ⇒ SPDR Nuveen Bloomberg Municipal Bond ETF (TFI) [EF]		09/11/2023	P	$1,001 - $15,000	
Betterment Retirement Account ⇒ SPDR Nuveen Bloomberg Municipal Bond ETF (TFI) [EF]		09/21/2023	P	$1,001 - $15,000	
Charles Schwab Investment Account ⇒ Vanguard Growth ETF (VUG) [EF]	SP	11/13/2023	P	$1,001 - $15,000	
Charles Schwab Rollover IRA ⇒ Vanguard Growth ETF (VUG) [EF]	SP	11/13/2023	P	$15,001 - $50,000	
Charles Schwab Roth IRA ⇒ Vanguard Growth ETF (VUG) [EF]	SP	11/13/2023	P	$15,001 - $50,000	

* 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

Source	Type	Amount
Virginia Economic Development Partnership	spouse salary	N/A
Guild	spouse salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Rocket Mortgage	October 2020	Mortgage on personal residence	$500,001 - $1,000,000

Schedule E: Positions

None disclosed.

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

- Alex Brown Raymond James brokerage
  Location: US
- Betterment Retirement Account
  Location: US
- Betterment Traditional IRA
- Charles Schwab Investment Account (Owner: SP)
  Location: US
- Charles Schwab Rollover IRA (Owner: SP)
- Charles Schwab Roth IRA (Owner: SP)
- Merrill Investment Account
  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

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. Josh Harder , 05/15/2024