



Filing ID #10058985

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. C. A. Dutch Ruppertsberger  
**Status:** Member  
**State/District:** MD02

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 04/29/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Baltimore County Md. Pension [PE]		Undetermined	None		<input type="checkbox"/>
Bank of America [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
Delaware Life ⇒ Compass 2 Variable Annuity [IH]		\$50,001 - \$100,000	Capital Gains	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: General Account (No specific holdings) RMD = required minimum distribution					
Delaware Life ⇒ Compass 2 Variable Annuity [IH]	SP	\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: General Account (No specific holdings) RMD = required minimum distribution					
M&T Bank [BA]	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Md. State Teachers Retirement Benefit [PE]	SP	Undetermined	None		<input type="checkbox"/>
Md.529 - College Investment Plan ⇒ Enrollment Portfolio 2024 [5P]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: MD					
DESCRIPTION: Purchased for grandchildren					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Md.529 - College Investment Plan ⇒ Enrollment Portfolio 2024 [5P]  LOCATION: MD DESCRIPTION: Purchased for grandchildren		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Md.529 - College Investment Plan ⇒ Enrollment Portfolio 2027 [5P]  LOCATION: MD		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Md.529 - College Investment Plan ⇒ Enrollment Portfolio 2027 [5P]  LOCATION: MD	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Nationwide Annuity ⇒ Nationwide Fixed Annuity - Dest.2030 [FN]  DESCRIPTION: General Account (no specific holdings) RMD = required minimum distribution		\$250,001 - \$500,000	Capital Gains	\$5,001 - \$15,000	<input type="checkbox"/>
Rupp&Assoc.,Inc [OL]  LOCATION: Timonium, MD, US DESCRIPTION: Legal collections	SP	\$250,001 - \$500,000	Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Sandy Shores Equity Group, LLC (Land) [RP]  LOCATION: Baltimore, MD, US	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Summit Community Bank [BA]	SP	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
TDAM IRA ⇒ IroQuois Fed. CD [BA]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TDAM IRA ⇒ ISHARES Trust 1-3 YR. [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TDAM IRA ⇒ IShares Trust 3-7 Yr Treasury Bd (IEI)TDAM [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TDAM IRA ⇒ Market Vectors (GDX) TDAM [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
TDAM IRA ⇒ Morgan Stanley CD [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TDAM IRA ⇒ S&P 600 Sm Cap EFT (SPSM) TDAM [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
TDAM IRA ⇒ SIMMONS CD [BA]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TDAM IRA ⇒ SPDR Portfolio LgCap (SPLG) TDAM [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
TDAM IRA ⇒ SPDR Trust S&P 500 (SPYD) TDAM [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
TDAM IRA ⇒ Sprott Physical Silver Trust ETV (PSLV) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
TDAM IRA ⇒ TDAM FDIC Insured IRA [IH]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: RMD=required minimum distribution					
TDAM IRA ⇒ United Fidelity CD [BA]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TDAM IRA ⇒ Wells Fargo Bank CD [BA]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" 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?
TDAM IRA ⇒ Discover Bank CD [BA]		05/9/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
TDAM IRA ⇒ IroQuois Fed. CD [BA]		09/11/2023	P	\$15,001 - \$50,000	
TDAM IRA ⇒ ISHares Trust 1-3YR. SHY [IR]		05/24/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
TDAM IRA ⇒ iShares US.Preferred Stock ETF (IPFF) [IR]		03/7/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TDAM IRA ⇒ iShares US.Preferred Stock ETF (IPFF) [IR]		03/13/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
TDAM IRA ⇒ RBS Citizens NA CD [BA]		02/9/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
TDAM IRA ⇒ Silvergate Bk CD [BA]		08/8/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
TDAM IRA ⇒ SIMMONS CD [BA]		05/24/2023	P	\$15,001 - \$50,000	
TDAM IRA ⇒ United Fidelity CD [BA]		06/2/2023	P	\$15,001 - \$50,000	
TDAM IRA ⇒ Wells Fargo Bank CD [BA]		08/8/2023	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
Baltimore County Maryland Pension	Retirement pension	\$95,387.00
Maryland State Teachers Pension	Spouse's pension	N/A
Delaware Life IRA	RMD distribution from Spouse's IRA	N/A
Delaware Life IRA	RMD distribution from IRA	\$3,049.00
Nationwide Fixed Account IRA	RMD distribution from IRA	\$14,214.00
TDAM FDIC Insured IRA	Qualified Charitable Deductions	N/A

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member (Uncompensated)	U. of Md. Medical Systems Shock Trauma

Chairman of Board (Uncompensated)	United States Naval Academy
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### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
August 1975	Baltimore Co. Employees Retirement System	Baltimore Co. Pension & Deferred Comp. Plan

### 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

<ul style="list-style-type: none"> <li>◦ Delaware Life</li> <li>◦ Delaware Life (Owner: SP)</li> <li>◦ Md.529 - College Investment Plan (Owner: SP) LOCATION: MD</li> <li>◦ Md.529 - College Investment Plan LOCATION: MD</li> <li>◦ Nationwide Annuity</li> <li>◦ TDAM IRA</li> </ul>
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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. C. A. Dutch Ruppertsberger , 04/29/2024