



Filing ID #10059001

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Lou Correa
Status: Member
State/District: CA46

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/5/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
457(b) OBRA-PST Plan-Nation [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
CBRE Clarion Securities [PE]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Chase Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Citibank Bank Accounts [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
County of Orange 401(a) Plan-Nationwide Fixed Acct. County of Orange State Value Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
County of Orange 457 Defined Contribution Plan [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Hotchkis and Wiley Mid-Cap Value [PE]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Interest Income Fund-SCPMG Retirement Plan Trust [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Jose Luis Correa Separate Property Trust [RP]		\$250,001 -	Rent	\$15,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Anaheim, CA, US DESCRIPTION: 1. Residential Property - Anaheim 3. 1115		\$500,000		\$50,000	<input type="checkbox"/>
	Jose Luis Correa Separate Property Trust [RP]	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Anaheim, CA, US DESCRIPTION: 2. Anaheim residential property 2. 236					
	Jose Luis Correa Separate Property Trust [RP]	\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Anaheim, CA, US DESCRIPTION: 3. Anaheim Residential property 1 230					
	Northern Trust TIPS Index Fund; Non-lending Tier [PE]	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Orange County Credit Union [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Orange County Employees Retirement System Defined Benefit Plan [PE]		Undetermined	Tax-Deferred		<input type="checkbox"/>
Pacific Premier [BA]		\$500,001 - \$1,000,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Robeco Boston Partners Small/Mid-Cap Value Fund [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Saving Plus House Large Cap Fund- Calif. State Employees [PE]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Target Date Fund 2020 457(b) Plan Savings Plus California State Employess 401(k) and 457 Plans					
Savings House Plus Funds Large Cap Fund-Calif. State Employees [PE]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds Bond Fund-Cal State Employees [PE]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Target Date Fund 2020 457(b) Plan Savings Plus California State Employess 401(k) and 457 Plans					
Savings Plus House Funds Bond Index Fund-Cal State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds International Fund -Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Savings plus House Funds International Index Fund-Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds Mid Cap Fund- Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds Mid Cap Index Fund-Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds Short Term Investment Fund Cash -Calif. State Employees [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds Short Term Investment Fund-Calif. State Employees [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus house Funds Small Cap Fund-Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House Funds Small Cap Index Fund - Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus House FundsLarge Cap Index Fund- Calif. State Employees [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
COMMENTS: Target Date Fund 2020 457 (b) Plan Savings Plus California State Employee 401(K) and 457 Plans					
Savings Plus Large Cap Index Fund-Calif. State Employees Savings Plus House Funds [PE]		\$500,001 - \$1,000,000	Tax-Deferred		<input type="checkbox"/>
SCPMG (So.Cal.Permanente Medical Group [DB]	JT	Undetermined	None		<input type="checkbox"/>
The Correa Reynoso Family Trust - Real property [RP]		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: San Diego, CA, US DESCRIPTION: Real Property 3. 1676					
The Correa Reynoso Family Trust - Real Property [RP]		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Santa Ana, CA, US DESCRIPTION: Real Property 2. 2836					
The Correa-Reynoso Family Trust - Real Propety [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Anaheim, CA, US DESCRIPTION: Real Property 1. 242					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
UC Savings Fund [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Instl Stk Mkt Idx 1 [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Int'l Growth Adm [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Target Retiret Trust Plus 2 [PE]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: SCPMG Keogh Plan					
Wellington Diversified Inflation Hedges [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Bank Accounts [BA]		\$100,001 - \$250,000	Interest	\$201 - \$1,000	<input type="checkbox"/>

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Southern California Permanente Group	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Orange County Credit Union	May, 2021	Car purchase loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2006	County of Orange, J. Luis Correa	Implied agreement to continue to be part of County of Orange Pension & 401(k) & 457.
November 2014	State of California, and J. Luis Correa	Implied agreement to continue to be part of state of California Pension 401(k) and & 457.

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	02/22/2023	02/25/2023	LAX, Los Angeles - Cartagena, Colomiba - LAX, Los Angeles	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Guatemala Prospera	08/22/2023	08/25/2023	LAX, Los Angeles - Guatemala City, Guatemala - San Salvador, El Salvador - Guatemala City, Guatemala - LAX, Los Angeles	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

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. Lou Correa , 05/5/2024