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FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Diana DeGette
Status: Member
State/District: CO01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 06/10/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Colorado PERA [DB]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
DeGette IRA ⇒ DFA Emerging Markets Core Equity [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DeGette IRA ⇒ DFA Global Real Estate Securities [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DeGette IRA ⇒ Dimensional International Core Equity Market [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DeGette IRA ⇒ Dimensional US Core Equity Market [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DeGette IRA ⇒ iShares Core US Aggregate Bond EFT [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DeGette IRA ⇒ iShares MSCI EAFE Small Cap Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DeGette IRA ⇒ Schwab Money Market Fund [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DeGette IRA ⇒ Vanguard Short-Term Bond Index [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DeGette IRA ⇒ Vanguard Small Cap ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Schwab Money Market Fund [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Spouse IRA ⇒ DFA Emerging Markets Core Equity [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse IRA ⇒ DFA Global Real Estate Securities [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse IRA ⇒ DFA International Core Equity [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse IRA ⇒ DFA International Small Co. [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse IRA ⇒ DFA Investment Grade Institutional [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse IRA ⇒ DFA Two-Year Global Fixed [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse IRA ⇒ iShares Core S&P 500 Index [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse IRA ⇒ Schwab Money Market Fund [BA]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Spouse IRA ⇒ Vanguard Inflation Protected Securities [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse IRA ⇒ Vanguard Short-Term Investment Grade [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse IRA ⇒ Vanguard Small Cap ETF [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse IRA ⇒	SP	\$100,001 -	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Small Cap Value [MF]		\$250,000			<input type="checkbox"/>
Spouse IRA ⇒ Vanguard Value [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Intelligent Life VUL ⇒ DFA VA Global Bond Portfolio [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Intelligent Life VUL ⇒ DFA VA International Small Portfolio [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Intelligent Life VUL ⇒ DFA VA International Value Portfolio [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Intelligent Life VUL ⇒ DFA VA Short-Term Fixed Income [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Intelligent Life VUL ⇒ DFA VA US Large Value Portfolio [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Intelligent Life VUL ⇒ DFA VA US Targeted Value [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Intelligent Life VUL ⇒ Templeton Developing Markets Securities Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Intelligent Life VUL ⇒ TIAA-CREF Fixed Rate Account [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Intelligent Life VUL ⇒ TIAA-CREF Life International Equity Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Intelligent Life VUL ⇒ TIAA-CREF Life Stock Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Bank West, N.A. [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<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?
DeGette IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]		05/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DeGette IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		05/12/2023	P	\$1,001 - \$15,000	
DeGette IRA ⇒ Vanguard Short-Term Bond Index Fund Admiral Shares (VBIRX) [MF]		05/12/2023	P	\$1,001 - \$15,000	
Spouse IRA ⇒ DFA Emerging Markets Core Equity Portfolio (DFCEX) [MF]	SP	05/12/2023	P	\$1,001 - \$15,000	
Spouse IRA ⇒ DFA Emerging Markets Core Equity Portfolio (DFCEX) [MF]	SP	05/17/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Spouse IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]	SP	05/17/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Spouse IRA ⇒ DFA International Core Equity Portfolio (DFIEX) [MF]	SP	05/10/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Spouse IRA ⇒ DFA International Core Equity Portfolio (DFIEX) [MF]	SP	05/17/2023	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Spouse IRA ⇒ DFA International Small Company Portfolio (DFISX) [MF]	SP	05/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Spouse IRA ⇒ DFA Investment Grade Portfolio (DFAPX) [MF]	SP	05/12/2023	P	\$15,001 - \$50,000	
Spouse IRA ⇒ DFA Two-Year Global Fixed Income Portfolio (DFGFX) [MF]	SP	05/12/2023	P	\$1,001 - \$15,000	
Spouse IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	05/17/2023	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Spouse IRA ⇒ iShares Global Infrastructure ETF (IGF) [EF]	SP	05/10/2023	S	\$100,001 - \$250,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Spouse IRA ⇒ Vanguard Inflation Protected Securities Fund Admiral Shares (VAIPX) [MF]	SP	05/12/2023	P	\$15,001 - \$50,000	
Spouse IRA ⇒ Vanguard Short-Term Investment Grade Fund Admiral Shrs (VFSUX) [MF]	SP	05/12/2023	P	\$15,001 - \$50,000	
Spouse IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	05/10/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Spouse IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	05/17/2023	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Spouse IRA ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	05/12/2023	P	\$50,001 - \$100,000	
Spouse IRA ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	05/17/2023	S (partial)	\$15,001 - \$50,000	<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 C: EARNED INCOME

Source	Type	Amount
State of Colorado	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Home Mortgage	January 2015	Mortgage on D.C. townhouse	\$250,001 - \$500,000
JT	Wells Fargo Home Mortgage	May 2017	Mortgage on Denver home	\$250,001 - \$500,000
JT	Wells Fargo Home Mortgage	June 2023	Mortgage on Park Hill house	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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?
U.S. Association for Former Members of Congress	02/15/2023	02/25/2023	Denver - Tokyo - Denver	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The Aspen Institute	04/10/2023	04/16/2023	Denver - Bellagio, Italy - Denver	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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">DeGette IRA DESCRIPTION: Diana DeGette's IRASpouse IRA (Owner: SP) DESCRIPTION: Lino Lipinsky's IRATIAA-CREF Intelligent Life VUL (Owner: SP)

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. Diana DeGette , 06/10/2024