



Filing ID #10059171

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Debbie Lesko  
**Status:** Member  
**State/District:** AZo8

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 05/16/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Express Savings Account [BA]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
AMEX DB PLAN ⇒ American Express Retirement Plan - CASH [DB]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
AMEX DC PLAN ⇒ The 2020 Retirement Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
AMEX DC PLAN ⇒ The 2025 Retirement Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
AMEX DC PLAN ⇒ The Stable Value Fund [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		<input checked="" type="checkbox"/>
AZ STATE PENSION [PE]		Undetermined	Tax-Deferred		<input type="checkbox"/>
Chase Bank Accounts [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
CONGRESSIONAL FEDERAL CREDIT UNION [BA]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
FI-401k ⇒ Fidelity Target Retirement 2020 [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
FI-401k ⇒ Fidelity Target Retirement 2035 [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
JPM IRA ⇒ Traditional IRA Rollover - CASH [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JPM RIRA ⇒ Roth Rollover - CASH [IH]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
NYCB Money Market [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
One AZ Credit Union [BA]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
US Savings Bonds [GS]		\$15,001 - \$50,000	None		<input type="checkbox"/>
VG RIRA ⇒ Vanguard Growth Index Admiral (VIGAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<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?
AMEX DC PLAN ⇒ AMEX COMPANY STOCK FUND [OT]  LOCATION: US DESCRIPTION: MUTUAL FUND	SP	11/13/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
AMEX DC PLAN ⇒ THE 2020 RETIREMENT FUND [OT]  LOCATION: US DESCRIPTION: MUTUAL FUND	SP	11/13/2023	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>
AMEX DC PLAN ⇒ THE 2025 RETIREMENT FUND [OT]  LOCATION: US DESCRIPTION: MUTUAL FUND	SP	11/13/2023	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
AMEX DC PLAN ⇒ THE 2025 RETIREMENT FUND [OT]  LOCATION: US DESCRIPTION: MUTUAL FUND	SP	Bi-weekly	P	\$1,001 - \$15,000	
AMEX DC PLAN ⇒ THE DIVERSIFIED BOND FUND [OT]  LOCATION: US DESCRIPTION: MUTUAL FUND	SP	11/13/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
AMEX DC PLAN ⇒ THE STABLE VALUE FUND [OT]  LOCATION: US DESCRIPTION: MUTUAL FUND	SP	11/13/2023	P	\$500,001 - \$1,000,000	
Series I Savings Bond [GS]	SP	01/3/2023	P	\$1,001 - \$15,000	
Series I Savings Bond [GS]		03/26/2023	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

Source	Type	Amount
AMERICAN EXPRESS	SPOUSE SALARY	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2009	Me and State of AZ	Participate in AZ State Pension Plan

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?
THE ASPEN INSTITUTE, INC. (CONGRESSIONAL PROGRAM)	08/26/2023	09/1/2023	PHOENIX, AZ - OLSO/BERGEN, NORWAY - PHOENIX, AZ	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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"><li>◦ AMEX DB PLAN (Owner: SP) DESCRIPTION: American Express Employee Retirement Plan - Defined Benefit</li><li>◦ AMEX DC PLAN (Owner: SP) DESCRIPTION: American Express Employee Retirement Plan - Defined Contribution</li><li>◦ FI-401k (Owner: SP)</li><li>◦ JPM IRA</li><li>◦ JPM RIRA</li><li>◦ VG RIRA</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: Debbie Lesko , 05/16/2024