



Filing ID #10059233

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. John B. Larson  
**Status:** Member  
**State/District:** CT01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 06/11/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Eagle Financial Credit Union Accounts [BA] DESCRIPTION: Savings account.	SP	\$1 - \$1,000	None		<input type="checkbox"/>
American Eagle Financial Credit Union Accounts [BA] DESCRIPTION: Savings.	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank of America [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Congressional Federal Credit Union accounts [BA] DESCRIPTION: Includes checking account, savings account, and money market account.		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Investments SEP IRA ⇒ Fidelity Treasury MM fund [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Merrill - A Bank of America Co - Cash [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Nationwide Fixed Index Annuity ⇒ Fixed Account [FN] DESCRIPTION: This was a partial Rollover from the federal Thrift Savings Plan (TSP) into this rollover IRA Fixed index Annuity.		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Nationwide Fixed Index Annuity ⇒ S & P Index [FN]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: This was a partial Rollover from the federal Thrift Savings Plan (TSP) into this rollover IRA Fixed index Annuity.					
State of Connecticut Deferred Compensation 457 Plan ⇒ American Fd American Mutual R6 [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ American Fd Euro Pacific Gro R6 [PE]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ Calvert Bond Fund Class I [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: There were multiple purchases of this asset in 2023 that were less than \$1,000 each.					
State of Connecticut Deferred Compensation 457 Plan ⇒ Connecticut Stable Value [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ JP MORGAN MID CAP VALUE I [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ Metrowest Total Return Bond [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ TIAA-CREF International Equity [PE]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ TIAA-Cref Lg Cap Gr Idx Instl [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ TIAA-CREF Small Cap Blend [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ Van Real Estate Idx Instl [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ Vanguard Infl-Protected Secs I [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ Vanguard Instl Index Instl Plus [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ Vanguard Mid Cap Index Fund [PE]	SP	\$1,001 - \$15,000	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?
State of Connecticut Deferred Compensation 457 Plan ⇒ Allspring Pr Lg Co Gro R6 [OT] LOCATION: US DESCRIPTION: Sale of Allspring Pr Lg Co Gro R6	SP	03/23/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ American Fd American Mutual R6 [OT] LOCATION: US DESCRIPTION: Purchase of American Fd American Mutual R6 - rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ American Fd Euro Pacific Gro R6 [OT] LOCATION: US DESCRIPTION: Purchase of American Fd Euro Pacific Gro R6	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ American Fd Euro Pacific Gro R6 [OT] LOCATION: US DESCRIPTION: Purchase of American Fd Euro Pacific Gro R6 - rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ American Fd Euro Pacific Gro R6 [OT] LOCATION: US DESCRIPTION: Purchase of American Fd Euro Pacific Gro R6 - rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ American Fd Euro Pacific Gro R6 [OT] LOCATION: US DESCRIPTION: Purchase of American Fd Euro Pacific Gro R6 - Rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ Connecticut Stable Value [OT] LOCATION: US DESCRIPTION: Sale of Connecticut Stable Value	SP	03/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ Connecticut Stable Value [OT] LOCATION: US DESCRIPTION: Sale of Connecticut Stable Value	SP	03/23/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
State of Connecticut Deferred Compensation 457 Plan ⇒ JP Morgan MID CAP VALUE I [OT] LOCATION: US DESCRIPTION: Purchase of JP Morgan MID CAP VALUE I - rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ Metro West Total Return Bond [OT] LOCATION: US DESCRIPTION: Sale of Metro West Total Return Bond	SP	03/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ TIAA-CREF International Equity [OT] LOCATION: US DESCRIPTION: Purchase of TIAA-CREF International Equity - rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ TIAA-CREF International Equity [OT] LOCATION: US DESCRIPTION: Purchase of TIAA-CREF International Equity	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ TIAA-CREF International Equity [OT] LOCATION: US DESCRIPTION: Purchase of TIAA-CREF International Equity - rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ TIAA-CREF International Equity [OT] LOCATION: US DESCRIPTION: Purchase of TIAA-CREF International Equity - rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ TIAA-CREF Lg Cap Gr Idx Inst1 [OT] LOCATION: US DESCRIPTION: Purchase of TIAA-CREF Lg Cap Gr Idx Inst1 - rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ TIAA-CREF Small Cap Blend [OT] LOCATION: US DESCRIPTION: Purchase of TIAA-CREF Small Cap Blend - rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ Vanguard Explorer Adm [OT] LOCATION: US DESCRIPTION: Sale of Vanguard Explorer Adm	SP	03/23/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
State of Connecticut Deferred Compensation 457 Plan ⇒ Vanguard Infl-Protected Sec I [OT] LOCATION: US DESCRIPTION: Sale of Vanguard Infl. Protected Secs I	SP	03/23/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
State of Connecticut Deferred Compensation 457 Plan ⇒ Vanguard Inst! Index Inst1 Plus [OT] LOCATION: US DESCRIPTION: Purchase of Vanguard Inst! Index Inst1 Plus - rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ Vanguard Mid Cap Index Fund [OT] LOCATION: US DESCRIPTION: Purchase of Vanguard Mid Cap Index Fund - rebalancing	SP	03/23/2023	P	\$1,001 - \$15,000	
State of Connecticut Deferred Compensation 457 Plan ⇒ Vanguard Total Bond Market Idx I [OT] LOCATION: US DESCRIPTION: Sale of Vanguard Total Bond Market Idx I	SP	05/23/2023	S	\$1,001 - \$15,000	<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 Connecticut	Spouse Salary	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	American Eagle FCU	March 2012	1st Mortgage; Primary Residence	\$50,001 - \$100,000

### 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**

- Fidelity Investments SEP IRA
- Nationwide Fixed Index Annuity
- State of Connecticut Deferred Compensation 457 Plan (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. John B. Larson , 06/11/2024