



Filing ID #10059275

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Derek Kilmer  
**Status:** Member  
**State/District:** WA06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 08/10/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones IRA ⇒ Bridge Builder Core Plus Bond Fund (BBCPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder International Equity Fund (BBIEX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Large Cap Growth Fund (BBGLX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Large Cap Value Fund (BBVLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Small/Mid Cap growth Fund (BBGSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Small/Mid Cap Value Fund (BBVSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Capital World Bond Fund - Class F-3 (WFBFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ DFA International Small Company Portfolio (DFISX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones IRA ⇒ Edward Jones Retirement Money Market [BA]		\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones IRA ⇒ Federated Hermes Institutional High Yield Bond Fund Class R6 Shares (FIHLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Financial Square Government Fund FST Shares (FGTXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Invesco International Small-Mid Company Fund Class R6 (OSCIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ iShares MSCI EAFE Small-Cap ETF (SCZ) [EF]		None	None		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ JPMorgan Emerging Markets Equity Fund R6 (JEMWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ TCW Emerging Markets Income Fund Plan Share (TGEPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Growth ETF (VUG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Large-Cap ETF (VV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Mid-Cap ETF (VO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones IRA ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones Roth IRA ⇒ Capital Income Builder Cl A Shs (CAIBX) [MF]  COMMENTS: Named on previous report as Roth IRA		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
McKinsey & Co. Money Purchase Pension Plan [PE]  DESCRIPTION: Defined contribution plan. Target Retirement 2040		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
McKinsey & Co. Profit Sharing Retirement Plan [PE]  DESCRIPTION: Defined contribution plan. Target Retirement 2040		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
WA State PERS Plan 2 [DB]  DESCRIPTION: Defined benefit plan		Undetermined	None		<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?
Edward Jones IRA ⇒ Invesco International Small-Mid Company Fund Class R6 (OSCIX) [MF]		10/26/2023	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ iShares MSCI EAFE Small-Cap ETF (SCZ) [EF]		10/26/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		05/15/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Mid-Cap ETF (VO) [EF]		05/15/2023	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]		05/15/2023	S (partial)	\$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
Princeton University	Salary	\$25,924.05
Princeton University	Expense Reimbursement	\$8,015.94

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	US Bank	October 2020	Home Mortgage	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Visiting Lecturer	Princeton University

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2005	State of Washington	Public Employees Retirement System Plan 2. PERS Plan 2 is a defined benefit plan. When you meet plan requirements and retire, you are guaranteed a monthly benefit based on earned service credit and compensation while a member of PERS Plan 2.
October 1999	McKinsey and Company Profit Sharing Retirement/Pension Plan	Retirement plan managed for McKinsey and Co. by Alight. The Plan is a Defined Contribution occupational pension plan operated for the exclusive purpose of providing retirement benefits and death benefits to eligible participants and beneficiaries. I am no longer contributing to the plan. It has a retirement target date of 2040.

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?
United Nations Foundation	10/23/2023	10/23/2023	New York, NY - New York, NY - Washington, DC	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Association of Marshall Scholars	01/12/2023	01/17/2023	Washington, DC - London, United Kingdom - Oxford, United Kingdom - Washington, DC	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

- Edward Jones IRA
- Edward Jones Roth IRA

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. Derek Kilmer , 08/10/2024