



Filing ID #10059396

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Suzanne Bonamici  
**Status:** Member  
**State/District:** OR01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 05/23/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise Managed Asset Account ⇒ Allspring Emerging Markets Equity Fund Institutional Class (EMGNX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Allspring Fd, Short-Term Municipal Bond Inst (WSBIX) [MF]  DESCRIPTION: New in 2023	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Contrarian Core Fund Class I (SMGIX) [MF]  DESCRIPTION: New in 2023	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Partners International Opportunities Fund - Investor Shares (GSINX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth Fund I Class (SEEGX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒	JT	None	Capital Gains,	\$5,001 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JPMorgan Tax Aware Equity Fund (JPDEX) [OT]			Dividends	\$15,000	
DESCRIPTION: Sold all in 2023. This is the JPMorgan Tax Aware Equity Fund (JPDEX). On December 11, 2023, Ameriprise liquidated the remainder of our interest in this mutual fund.					
Ameriprise Managed Asset Account ⇒ Loomis Sayles Funds - Growth Fund Class Y (LSGRX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MainStay MacKay Tax Free Bond Fund, Class I (MTBIX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS International Value Fund Class I (MINIX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Municipal High Income Fd Cl I (MMIIX) [MF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Sold All in 2023					
Ameriprise Managed Asset Account ⇒ MFS Value Fund - Class I (MEIIX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi-Manager Small Cap Equity Strategies Fund Class I (CZMSX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi-Manager Total Return Bond Strategies Fund Class I (CTRZX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi-Manager Value Strategies Fund Class I (CZMVX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Nuveen Flagship Limited Term Municipal Bond Fd Cl R Shs (FLTRX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF (VO) [EF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate-Term Municipals Fund Class I (SBTYX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Michael H. Simon Royalties ⇒ Concord Theatricals (fka as Samuel French, Inc. and Tams-	SP	\$15,001 - \$50,000	Royalties	\$5,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Witmark Music Library, Inc.) [IP]					
DESCRIPTION: (Royalties from The Odd Couple and Promises, Promises)					
Michael H. Simon Royalties ⇒ GEP Talent Services, LLC [IP]	SP	\$1,001 - \$15,000	Royalties	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: (miscellaneous television rerun royalties)					
Michael H. Simon Royalties ⇒ International Authors Society [IP]	SP	\$15,001 - \$50,000	Royalties	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: (Royalties from The Odd Couple)					
Miscellaneous Assets Jointly Owned ⇒ Ameriprise Cash Holding [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Gold Coins [CO]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
Miscellaneous Assets Jointly Owned ⇒ Northwestern Mutual Life Ins. Co. [OT]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: (life ins. cash value)					
Miscellaneous Assets Jointly Owned ⇒ U.S. Bank NA [BA]	JT	\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: checking and savings accounts					
Suzanne's Personal Assets ⇒ Franklin Templeton Growth Target Fund Class A (FGTIX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Suzanne's Personal Assets ⇒ OnPoint Community Credit Union [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: checking and savings accounts					
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	SP	\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP Fund Admiral Shares (VPMAX) [MF]	SP	\$500,001 - \$1,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP Fund Admiral Shares (VPMAX) [MF]	SP	\$1,000,001 - \$5,000,000	Dividends	\$50,001 - \$100,000	<input checked="" 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?
Ameriprise Managed Asset Account ⇒ Allspring Emerging Markets Equity Fund Institutional Class (EMGNX) [MF]	JT	02/15/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Allspring Emerging Markets Equity Fund Institutional Class (EMGNX) [MF]	JT	05/19/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Allspring Emerging Markets Equity Fund Institutional Class (EMGNX) [MF]	JT	08/16/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Allspring Fd, Short-Term Municipal Bond Inst (WSBIX) [MF] DESCRIPTION: Buy New	JT	05/19/2023	P	\$50,001 - \$100,000	
Ameriprise Managed Asset Account ⇒ Allspring Fd, Short-Term Municipal Bond Inst (WSBIX) [MF]	JT	08/16/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Allspring Fd, Short-Term Municipal Bond Inst (WSBIX) [MF]	JT	11/17/2023	S (partial)	\$587.00	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Columbia Contrarian Core Fund Class I (SMGIX) [MF] DESCRIPTION: Buy New	JT	12/11/2023	P	\$50,001 - \$100,000	
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Partners International Opportunities Fund - Investor Shares (GSINX) [MF]	JT	02/15/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Partners International Opportunities Fund - Investor Shares (GSINX) [MF]	JT	05/19/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Partners International Opportunities Fund - Investor Shares (GSINX) [MF]	JT	08/16/2023	P	\$978.00	
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Partners International Opportunities Fund - Investor Shares (GSINX) [MF]	JT	11/17/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Goldman Sachs GQG Partners International Opportunities Fund - Investor Shares (GSINX) [MF]	JT	12/21/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	JT	02/15/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	JT	05/19/2023	S (partial)	\$249.00	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	JT	06/13/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	JT	08/16/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]	JT	11/17/2023	S (partial)	\$852.00	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth Fund I Class (SEEGX) [MF]	JT	02/15/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth Fund I Class (SEEGX) [MF]	JT	05/19/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth Fund I Class (SEEGX) [MF]	JT	08/16/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Large Cap Growth Fund I Class (SEEGX) [MF]	JT	11/17/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity Fund (JPDEX) [OT] LOCATION: US DESCRIPTION: This is the JPMorgan Tax Aware Equity Fund (JPDEX).	JT	02/15/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity Fund (JPDEX) [OT] LOCATION: US DESCRIPTION: This is the JPMorgan Tax Aware Equity Fund (JPDEX).	JT	05/19/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity Fund (JPDEX) [OT] LOCATION: US	JT	08/16/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: This is the JPMorgan Tax Aware Equity Fund (JPDEX).					
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity Fund (JPDEX) [OT]	JT	11/17/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
LOCATION: US					
DESCRIPTION: This is the JPMorgan Tax Aware Equity Fund (JPDEX).					
Ameriprise Managed Asset Account ⇒ JPMorgan Tax Aware Equity Fund (JPDEX) [OT]	JT	12/11/2023	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LOCATION: US					
DESCRIPTION: This is the JPMorgan Tax Aware Equity Fund (JPDEX). On December 11, 2023, Ameriprise liquidated the remainder of our interest in this mutual fund. Note: Sell All.					
Ameriprise Managed Asset Account ⇒ Loomis Sayles Funds - Growth Fund Class Y (LSGRX) [MF]	JT	02/15/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Loomis Sayles Funds - Growth Fund Class Y (LSGRX) [MF]	JT	05/19/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Loomis Sayles Funds - Growth Fund Class Y (LSGRX) [MF]	JT	08/16/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Loomis Sayles Funds - Growth Fund Class Y (LSGRX) [MF]	JT	11/17/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Loomis Sayles Funds - Growth Fund Class Y (LSGRX) [MF]	JT	12/21/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ MainStay MacKay Tax Free Bond Fund, Class I (MTBIX) [MF]	JT	02/15/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MainStay MacKay Tax Free Bond Fund, Class I (MTBIX) [MF]	JT	05/19/2023	P	\$50,001 - \$100,000	
Ameriprise Managed Asset Account ⇒ MainStay MacKay Tax Free Bond Fund, Class I (MTBIX) [MF]	JT	08/16/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ MainStay MacKay Tax Free Bond Fund, Class I (MTBIX) [MF]	JT	11/17/2023	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ MFS International Value Fund Class I (MINIX) [MF]	JT	02/15/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ MFS International Value Fund Class I (MINIX) [MF]	JT	05/19/2023	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ MFS International Value Fund Class I (MINIX) [MF]	JT	08/16/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ MFS International Value Fund Class I (MINIX) [MF]	JT	11/17/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS International Value Fund Class I (MINIX) [MF]	JT	12/20/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ MFS Municipal High Income Fd Cl I (MMIIX) [MF]	JT	02/15/2023	P	\$515.00	
Ameriprise Managed Asset Account ⇒ MFS Municipal High Income Fd Cl I (MMIIX) [MF] DESCRIPTION: Sell All	JT	05/19/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value Fund - Class I (MEIIX) [MF]	JT	02/15/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ MFS Value Fund - Class I (MEIIX) [MF]	JT	05/19/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ MFS Value Fund - Class I (MEIIX) [MF]	JT	08/16/2023	P	\$111.00	
Ameriprise Managed Asset Account ⇒ MFS Value Fund - Class I (MEIIX) [MF]	JT	11/17/2023	P	\$502.00	
Ameriprise Managed Asset Account ⇒ MFS Value Fund - Class I (MEIIX) [MF]	JT	12/15/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi-Manager Small Cap Equity Strategies Fund Class I (CZMSX) [MF]	JT	02/15/2023	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ Multi-Manager Small Cap Equity Strategies Fund Class I (CZMSX) [MF]	JT	05/19/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi-Manager Small Cap Equity Strategies Fund Class I	JT	08/16/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
(CZMSX) [MF]					
Ameriprise Managed Asset Account ⇒ Multi-Manager Small Cap Equity Strategies Fund Class I (CZMSX) [MF]	JT	11/17/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi-Manager Small Cap Equity Strategies Fund Class I (CZMSX) [MF]	JT	12/12/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi-Manager Total Return Bond Strategies Fund Class I (CTRZX) [MF]	JT	02/15/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi-Manager Total Return Bond Strategies Fund Class I (CTRZX) [MF]	JT	05/19/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi-Manager Total Return Bond Strategies Fund Class I (CTRZX) [MF]	JT	08/16/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi-Manager Value Strategies Fund Class I (CZMVX) [MF]	JT	02/15/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi-Manager Value Strategies Fund Class I (CZMVX) [MF]	JT	05/19/2023	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ Multi-Manager Value Strategies Fund Class I (CZMVX) [MF]	JT	08/16/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Multi-Manager Value Strategies Fund Class I (CZMVX) [MF]	JT	11/17/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Multi-Manager Value Strategies Fund Class I (CZMVX) [MF]	JT	12/11/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Nuveen Flagship Limited Term Municipal Bond Fd Cl R Shs (FLTRX) [MF]	JT	02/15/2023	P	\$15,001 - \$50,000	
Ameriprise Managed Asset Account ⇒ Nuveen Flagship Limited Term Municipal Bond Fd Cl R Shs (FLTRX) [MF]	JT	05/19/2023	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ameriprise Managed Asset Account ⇒ Nuveen Flagship Limited Term Municipal Bond Fd Cl R Shs (FLTRX) [MF]	JT	08/16/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Nuveen Flagship Limited Term Municipal Bond Fd Cl R Shs (FLTRX) [MF]	JT	11/17/2023	P	\$120.00	
Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF (VO) [EF]	JT	02/15/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF (VO) [EF]	JT	05/19/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF (VO) [EF]	JT	08/16/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Vanguard Mid-Cap ETF (VO) [EF]	JT	11/17/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate-Term Municipals Fund Class I (SBTYX) [MF]	JT	02/15/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate-Term Municipals Fund Class I (SBTYX) [MF]	JT	05/19/2023	S (partial)	\$579.00	<input type="checkbox"/>
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate-Term Municipals Fund Class I (SBTYX) [MF]	JT	08/16/2023	P	\$1,001 - \$15,000	
Ameriprise Managed Asset Account ⇒ Western Asset Intermediate-Term Municipals Fund Class I (SBTYX) [MF]	JT	11/17/2023	P	\$15,001 - \$50,000	
Michael H. Simon Beneficiary IRA at Ameriprise ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	11/30/2023	P	\$1,001 - \$15,000	
Suzanne Bonamici IRA at Ameriprise ⇒ Franklin Templeton Growth Target Fund Class A (FGTIX) [MF]		06/15/2023	P	\$1,001 - \$15,000	
Suzanne Bonamici IRA at Ameriprise ⇒		06/30/2023	P	\$353.00	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Franklin Templeton Growth Target Fund Class A (FGTIX) [MF]					
Suzanne Bonamici IRA at Ameriprise ⇒ Franklin Templeton Growth Target Fund Class A (FGTIX) [MF]		09/29/2023	P	\$294.00	
Suzanne Bonamici IRA at Ameriprise ⇒ Franklin Templeton Growth Target Fund Class A (FGTIX) [MF]		12/28/2023	P	\$295.00	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	SP	03/23/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	SP	06/28/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	SP	09/27/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	SP	12/19/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	12/29/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	01/31/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	02/28/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	03/31/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	04/28/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market	SP	05/31/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fund (VMFXX) [MF]					
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	06/30/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	07/31/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	08/31/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	09/29/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard Money Market Reserves Federal Money Market Fund (VMFXX) [MF]	SP	10/31/2023	P	\$1,001 - \$15,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP Fund Admiral Shares (VPMAX) [MF]	SP	12/19/2023	P	\$248.00	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP Fund Admiral Shares (VPMAX) [MF]	SP	12/19/2023	P	\$15,001 - \$50,000	
The Michael H. Simon Rollover IRA at Vanguard ⇒ Vanguard PRIMECAP Fund Admiral Shares (VPMAX) [MF]	SP	12/19/2023	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
United States Judges (Administrative Office of U.S. Courts)	Spouse Salary	N/A

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

Source	Description	Value
Duke University School of Law (Durham, NC, US)	Duke University School of Law tuition, room, and board	\$31,532.00
COMMENTS: Duke University School of Law provided Michael H. Simon (spouse) with free tuition, room, and board valued at \$31,532 in connection with a four-week educational program at Duke Law School, Master of Judicial Studies LLM Program.		

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Duke University School of Law	05/20/2023	06/17/2023	Portland, Oregon - Raleigh-Durham, North Carolina - Portland, Oregon	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"><li>Ameriprise Managed Asset Account (Owner: JT) LOCATION: US</li><li>Michael H. Simon Beneficiary IRA at Ameriprise (Owner: SP) LOCATION: US</li><li>Michael H. Simon Royalties (Owner: SP) LOCATION: US</li><li>Miscellaneous Assets Jointly Owned (Owner: JT) LOCATION: US</li><li>Suzanne Bonamici IRA at Ameriprise LOCATION: US</li><li>Suzanne's Personal Assets LOCATION: US</li><li>The Michael H. Simon Rollover IRA at Vanguard (Owner: SP) LOCATION: US</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:** Hon. Suzanne Bonamici , 05/23/2024