



Filing ID #10059399

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Glenn Ivey
Status: Member
State/District: MDo4

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/13/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Allspring ⇒ Allspring Government Securities Fund Class A (SGV DX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒ Ameriprise Insured Money Market [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒ Caterpillar, Inc. Common Stock (CAT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒ ConocoPhillips Common Stock (COP) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒ First Eagle Global Fund Class I (SGIIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒ PIMCO All Asset Fund Class I-2 (PALPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Templeton Global Bond Fund Advisor Class (TGBAX) [MF]					<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒ Vanguard Intermediate-Term Bond ETF (BIV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise - Inherited IRA ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Ameriprise Insured Money Market [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Apple Inc. - Common Stock (AAPL) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Booz Allen Hamilton Holding Corporation Common Stock (BAH) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Brookfield Asset Management Inc Class A Limited Voting Shares (BAM) [ST]	JT	\$1 - \$1,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Brookfield Corporation Class A Limited Voting Shares (BN) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Caterpillar, Inc. Common Stock (CAT) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise Brokerage Account ⇒ Coca-Cola Company (KO) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ ConocoPhillips Common Stock (COP) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Eaton Vance Short Duration Strategic Income Fund -Class I (ESIIX) [MF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Fidelity Advisor Real Estate Income Fund: Class I (FRIRX) [MF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Fidelity Advisor Strategic Income Fund: Class I (FSRIX) [MF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Fidelity Insti Money Market Funds Money Market Port - Inst Cl (FNSXX) [MF]	JT	\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ First Eagle Global Fund Class I (SGIIX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Franklin Federal Tax Free Income Fund Advisor Class (FAFTX) [MF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Pfizer, Inc. Common Stock (PFE) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Brokerage Account ⇒ Visa Inc. (V) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Broadcast Music, Inc. [IP]	SP	\$1,001 - \$15,000	royalties	\$5,001 - \$15,000	<input type="checkbox"/>
Congressional Federal Credit Union [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Checking Account					
Empower ⇒ American Funds 2030 Target Date Retirement Fd Cl R-6 (RFETX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 401-qualified plan					
Ivey & Levetown LLC [OL]		None	None		<input type="checkbox"/>
LOCATION: Greenbelt, MD, US					
DESCRIPTION: The LLC has been closed					
Maryland State Retirement Agency [PE]		Undetermined	Tax-Deferred		<input type="checkbox"/>
Maryland State Retirement Agency [PE]	SP	Undetermined	Tax-Deferred		<input type="checkbox"/>
Residential Property [RP]	SP	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Orlando, FL, US					
UMG Recordings [IP]	SP	\$1,001 - \$15,000	royalties	\$5,001 - \$15,000	<input type="checkbox"/>
Universal Music Publishing [IP]	SP	\$1,001 - \$15,000	royalties	\$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 B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Self -employment income	Spouse Real Estate Fees	N/A
Maryland State Retirement Agency	Spouse Pension	N/A
Prince George's County, MD	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Congressional Federal Credit Union	April 23, 2014	Home Equity Loan	\$15,001 - \$50,000
JT	Freedom Mortgage	June 2023	Mortgage on private residence in Capitol Heights, MD	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2011	Filer and Maryland State Retirement Agency	Defined benefit plan that provides service retirement benefits.

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?
American Israel Education Foundation, Inc. (AIEF)	09/1/2023	09/10/2023	Washington, DC - Tel Aviv - Rwanda - Washington, DC	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">Allspring (Owner: JT) LOCATION: USAmeriprise - Inherited IRA DESCRIPTION: Inherited assets September 2023Ameriprise Brokerage Account (Owner: JT) DESCRIPTION: Inherited assets September 2023Empower (Owner: SP) DESCRIPTION: Formerly reported as Mission Square Retirement
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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

COMMENTS

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. Glenn Ivey , 08/13/2024