Filing ID #10059532

Financial Disclosure Report

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Filer Information

Name: Hon. Andy Kim
Status: Member
State/District: NJ03

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?
Bank of America Checking [BA]		$1,001 - $15,000	Interest	$1 - $200	☐
Bank of America Savings [BA]		$1,001 - $15,000	Interest	$1 - $200	☐
Capitol One Savings [BA]	JT	$100,001 - $250,000	Interest	$1,001 - $2,500	☐
Equitable Brightlife Grow Series 155 Core Russell 2000 1yr. [WU]		$1,001 - $15,000	None		☐
Equitable Brightlife Grow Series 155 Core S&P 500 1yr. [WU]		$1,001 - $15,000	None		☐
Equitable Brightlife Grow Series 155 Guaranteed Interest [WU]		$1,001 - $15,000	None		☐
Equitable Brightlife Grow Series Core S&P 500 3yr. [WU]		$1,001 - $15,000	None		☐
Equitable Structured Capital Strategies 16B NASDAQ 100 1yr. 10% Buffer [OT] Description: Variable Annuity		$15,001 - $50,000	None		☐
Equitable Structured Capital Strategies 16B Russell 2000 5yr.		$15,001 - $50,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Annual Lock 10% Buffer [OT] Description: Variable Annuity					
Equitable Structured Capital Strategies 16B S&P 500 1yr. 10% Buffer [OT] Description: Variable Annuity		$15,001 - $50,000	None		
Equitable Structured Capital Strategies 16B S&P 500 5yr. Annual Lock 10% Buffer [OT] Description: Variable Annuity		$15,001 - $50,000	None		
HSA ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIIIX) [MF] Description: Spouse Employer HSA. Qualified EIF		$1,001 - $15,000	Dividends	None	
HSA ⇒ Vanguard Short-Term Bond Index Fund Admiral Shares (VBIRX) [MF] Description: Spouse Employer HSA. Qualified EIF		$1,001 - $15,000	Dividends	None	
HSA ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF] Description: Spouse Employer HSA. Qualified EIF		$15,001 - $50,000	Dividends	None	
HSA ⇒ Vanguard Target Retirement Income Fund (VTINX) [MF] Description: Spouse Employer HSA. Qualified EIF		$1,001 - $15,000	Dividends	None	
HSA ⇒ Vanguard Total Bond Market Insti Plus Shares (VBMPX) [MF] Description: Spouse Employer HSA. Qualified EIF		$1,001 - $15,000	Dividends	None	
HSA ⇒ Vanguard Total Intl Stock Index Fund Institutional Plus (VTPSX) [MF] Description: Spouse Employer HSA. Qualified EIF		$1,001 - $15,000	Dividends	None	
Merrill Edge 529 ⇒ BlackRock Advantage International Instl [MF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge 529 ⇒ BlackRock Advantage Large Cap Gr Instl [MF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge 529 ⇒		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
BlackRock Capitol Appreciation Instl [MF]					
Merrill Edge 529 ⇒ BlackRock Equity Dividend Instl [MF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge 529 ⇒ BlackRock International Instl [MF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge 529 ⇒ BlackRock Large Cap Focus Value Instl [MF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge 529 ⇒ BlackRock Strategic Income Opps Instl [MF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge 529 ⇒ BlackRock Total Return Instl [MF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge 529 ⇒ IShares MSCI Total Intl Idx Instl [MF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge 529 ⇒ IShares S&P 500 Index [MF]		$1,001 - $15,000	Tax-Deferred		
T.Rowe Price 401K ⇒ T Rowe Price Equity Index Tr-Z [MF]	SP	$1,001 - $15,000	Tax-Deferred		
T.Rowe Price 401K ⇒ T Rowe Price Growth Stock Tr-Z [MF]	SP	$15,001 - $50,000	Tax-Deferred		
T.Rowe Price 401K ⇒ T Rowe Price International Core Eq Tr-Z [MF]	SP	$1,001 - $15,000	Tax-Deferred		
T.Rowe Price 401K ⇒ T Rowe Price International Val Eq Tr-Z [MF]	SP	$1,001 - $15,000	Tax-Deferred		
T.Rowe Price 401K ⇒ T Rowe Price US Value Equity Tr-Z [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Vanguard 529 Target Enrollment 2034/2035 Portfolio ⇒ Vanguard Total Bond Market II Index Fund Institutional Shares [MF]		$1,001 - $15,000	Tax-Deferred		
Vanguard 529 Target Enrollment 2034/2035 Portfolio ⇒ Vanguard Total International Bond Index Fund Institutional		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Shares [MF]					
Vanguard 529 Target Enrollment 2034/2035 Portfolio ⇒ Vanguard Total International Stock Index Fund [MF]		$1,001 - $15,000	Tax-Deferred		☐
Vanguard 529 Target Enrollment 2034/2035 Portfolio ⇒ Vanguard Total Stock Market Institutional Select [MF]		$1,001 - $15,000	Tax-Deferred		☐
Vanguard Mutual Fund Brokerage Account ⇒ Vanguard Intermediate-Term Tax Exempt Fund Admiral Shares [MF]		$15,001 - $50,000	Dividends	None	☐
Vanguard Mutual Fund Brokerage Account ⇒ Vanguard Limited Tax-Exempt Fund Admiral Shares [MF]		$1,001 - $15,000	Dividends	None	☐
Vanguard Mutual Fund Brokerage Account ⇒ Vanguard Long-Term Tax-Exempt Fund Admiral Shares [MF]		$15,001 - $50,000	Dividends	None	☐
Vanguard Mutual Fund Brokerage Account ⇒ Vanguard Total International Stock ETF [EF] DESCRIPTION: Vanguard Total International Stock ETF		$50,001 - $100,000	Dividends	None	☐
Vanguard Mutual Fund Brokerage Account ⇒ Vanguard Total Stock Market ETF [EF]		$50,001 - $100,000	Dividends	None	☐
Vanguard Retirement ⇒ Vanguard Institutional Total International Stock Market index Trust II [MF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Vanguard Retirement ⇒ Vanguard Total Bond Market II Index Fund Institutional Shares [MF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Vanguard Retirement ⇒ Vanguard Total International Bond II Index Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Vanguard Retirement ⇒ Vanguard Total Stock Market Index Fund Institutional Plus Shares [MF]	SP	$50,001 - $100,000	Tax-Deferred		☐

* 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
Vanguard	Spouse Salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Valon	July 2015	mortgage	$250,001 - $500,000
JT	Mr Cooper	March 2019	Mortgage	$250,001 - $500,000

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

- HSA
  Location: US
- Merrill Edge 529
  Location: DC
- T.Rowe Price 401K (Owner: SP)
  Description: Spouse Retirement
- Vanguard 529 Target Enrollment 2034/2035 Portfolio
  Location: NJ
- Vanguard Mutual Fund Brokerage Account
  Location: US

- Vanguard Retirement (Owner: SP)
  Description: Spouse Retirement

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. Andy Kim , 08/13/2024