



Filing ID #10059582

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Colin Allred  
**Status:** Member  
**State/District:** TX32

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 05/15/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bert Bell/Pete Rozelle NFL Player Retirement Plan [DB]		Undetermined	None		<input type="checkbox"/>
DESCRIPTION: The amount of the pension will vary depending upon what age the Filer begins to draw his pension. Filer is not eligible to draw until April 2038.					
Cleary Gottlieb Fidelity Retirement Plan ⇒ Vanguard Target 2055 [PE]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: The Vanguard target date fund invests in a mix of stocks and bonds.					
Cooley LLP Salary Deferral & Profit Sharing Plan ⇒ Schwab Indexed Retirement Trust Fund 2055 [PE]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: This is a target date fund with an investment mix across a variety of asset classes.					
Fidelity 500 Index Fund (FXAIX) [MF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Advisor Intermediate Municipal Income Fund: Class Z (FIQZX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity International Index Fund (FSPSX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
iShares 7-10 Year Treasury Bond ETF (IEF) [EF]	JT	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
COMMENTS: Sold					
iShares Core S&P Mid-Cap ETF (IJH) [EF]	JT	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
COMMENTS: Purchased and Sold in 2023					
iShares Short Treasury Bond ETF (SHV) [EF]	JT	None	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
COMMENTS: Purchased and sold in 2023					
JP Morgan Chase Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
JP Morgan Chase Savings Account [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
JP Morgan Tr. II US Gov't Money Market Fund [BA]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JPMorgan BetaBuilders Canada ETF (BBCA) [EF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
JPMorgan BetaBuilders Developed Asia Pacific-ex Japan ETF (BBAX) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
JPMorgan BetaBuilders Europe ETF (BBEU) [EF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
COMMENTS: Purchased in 2023 after being sold in 2022					
JPMorgan BetaBuilders Japan ETF (BBJP) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Legal Aid of NorthWest Texas 401K Thrift Plan ⇒ Mutual of America 2055 Retirement Fund [PE]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Legal Aid of NorthWest Texas 401K Thrift Plan ⇒ Mutual of America Money Market Fund [PE]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
NFL Health Reimbursement Account (HRA) [OT]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: The NFL Health Reimbursement Account (HRA) reimburses a wide variety of IRS eligible medical expenses. This account does not earn any interest.					
NFL Player Annuity Program Trust [OT]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Through the NFL Player Annuity Program, a player's club deposited money into an investment account on the player's behalf during their years of play. When eligible, the player may choose how and when to access the funds.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
NFL Player Second Career Savings Plan 401(k) Savings Plan ⇒ NFL 401(k) Savings Plan International Equity Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: This is a customized fund created by the Savings Board of the NFL Player Second Career Savings Plan and available only as part of the 401(k) Savings Plan and NFL Player Capital Accumulation Plan. It is not a mutual fund offered to the general public. The composition of the fund is determined by the fund's investment advisor.					
NFL Player Second Career Savings Plan 401(k) Savings Plan ⇒ NFL 401(k) Savings Plan Target Date 2045 Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: This is a customized fund created by the Savings Board of the NFL Player Second Career Savings Plan and available only as part of the 401(k) Savings Plan and NFL Player Capital Accumulation Plan. It is not a mutual fund offered to the general public. The composition of the fund is determined by the fund's investment advisor.					
NFL Player Second Career Savings Plan 401(k) Savings Plan ⇒ NFL 401(k) Savings Plan US Large Company Equity Fund [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: This is a customized fund created by the Savings Board of the NFL Player Second Career Savings Plan and available only as part of the 401(k) Savings Plan and NFL Player Capital Accumulation Plan. It is not a mutual fund offered to the general public. The composition of the fund is determined by the fund's investment advisor.					
NFL Player Second Career Savings Plan 401(k) Savings Plan ⇒ NFL 401(k) Savings Plan US Mid/Small Company Equity Fund [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: This is a customized fund created by the Savings Board of the NFL Player Second Career Savings Plan and available only as part of the 401(k) Savings Plan and NFL Player Capital Accumulation Plan. It is not a mutual fund offered to the general public. The composition of the fund is determined by the fund's investment advisor.					
NY's Advisor-Guided College Savings Program: JP Morgan 529 Age-Based 0-5 Portfolio A for DC 1 [OT]	DC	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Established in 2021 (for Dependent Child #2). Filer has no control over investment decisions.					
NY's Advisor-Guided College Savings Program: JP Morgan 529 Age-Based 0-5 Portfolio A for DC 2 [OT]	DC	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Established in 2019 (for Dependent Child #1). Filer has no control over investment decisions.					
Perkins Coie Salary Deferral Plan ⇒ Vanguard Target Retirement 2050 Trust I [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: A fund of fund structure that seeks to build appropriate asset allocation from preselected stock and bond portfolios. The trust handles investment selection, asset allocation, and rebalancing through retirement.					
Schwab Intermediate-Term U.S. Treasury ETF (SCHR) [EF]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
COMMENTS: SOLD					
Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Six Circles Credit Opportunities Fund (CRDOX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Six Circles International Unconstrained Equity Fund (CIUEX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Six Circles Tax Aware Bond Fund (CBTAX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Six Circles US Unconstrained Equity Fund (CUSUX) [MF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
US Savings Bonds [GS]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Also sometimes referred to as Vanguard Scottsdale Funds Intermediate Term Treasury ETF					
Vanguard Tax-Exempt Bond ETF (VTEB) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Cooley LLP Salary Deferral & Profit Sharing Plan: Schwab Indexed Retirement Trust Fund 2055 [OT]	SP	01/12/2034	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: Employee Contribution to 401(k) Plan					
Cooley LLP Salary Deferral & Profit Sharing Plan: Schwab Indexed Retirement Trust Fund 2055 [OT]	SP	01/30/2023	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: Employee Contribution to 401K Plan					
Cooley LLP Salary Deferral & Profit Sharing Plan: Schwab Indexed Retirement Trust Fund 2055 [OT]	SP	02/14/2023	P	\$15,001 - \$50,000	
LOCATION: US DESCRIPTION: Employee Contribution to 401K Plan					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity 500 Index Fund (FXAIX) [MF]	JT	01/20/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity 500 Index Fund (FXAIX) [MF]	JT	02/14/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity 500 Index Fund (FXAIX) [MF] DESCRIPTION: Reinvestment	JT	07/10/2023	P	\$1,001 - \$15,000	
Fidelity 500 Index Fund (FXAIX) [MF] DESCRIPTION: Reinvestment	JT	10/10/2023	P	\$1,001 - \$15,000	
Fidelity 500 Index Fund (FXAIX) [MF] DESCRIPTION: Reinvestment	JT	12/18/2023	P	\$1,001 - \$15,000	
Fidelity Advisor Intermediate Municipal Income Fund: Class Z (FIQZX) [MF]	JT	02/14/2023	P	\$1,001 - \$15,000	
Fidelity International Index Fund (FSPSX) [MF]	JT	01/20/2023	P	\$1,001 - \$15,000	
Fidelity International Index Fund (FSPSX) [MF]	JT	06/22/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity International Index Fund (FSPSX) [MF]	JT	06/22/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity International Index Fund (FSPSX) [MF]	JT	06/22/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares 7-10 Year Treasury Bond ETF (IEF) [EF]	JT	02/14/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
iShares Core S&P Mid-Cap ETF (IJH) [EF]	JT	07/31/2023	P	\$1,001 - \$15,000	
iShares Core S&P Mid-Cap ETF (IJH) [EF]	JT	12/13/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
iShares Short Treasury Bond ETF (SHV) [EF]	JT	02/14/2023	P	\$1,001 - \$15,000	
iShares Short Treasury Bond ETF (SHV) [EF]	JT	05/12/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
JPMorgan BetaBuilders Canada ETF (BBCA) [EF]	JT	06/22/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPMorgan BetaBuilders Europe ETF (BBEU) [EF]	JT	01/20/2023	P	\$1,001 - \$15,000	
JPMorgan BetaBuilders Europe ETF (BBEU) [EF]	JT	12/14/2023	P	\$1,001 - \$15,000	
JPMorgan BetaBuilders Europe ETF (BBEU) [EF]	JT	07/31/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JPMorgan BetaBuilders Japan ETF (BBJP) [EF]	JT	06/22/2023	P	\$1,001 - \$15,000	
Schwab Intermediate-Term U.S. Treasury ETF (SCHR) [EF]	JT	12/6/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]	JT	02/14/2023	P	\$1,001 - \$15,000	
Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]	JT	05/12/2023	P	\$1,001 - \$15,000	
Six Circles Credit Opportunities Fund (CRDOX) [MF]	JT	02/14/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Six Circles Credit Opportunities Fund (CRDOX) [MF]	JT	02/14/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Six Circles International Unconstrained Equity Fund (CIUEX) [MF]	JT	12/15/2023	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvestment					
Six Circles Tax Aware Bond Fund (CBTAX) [MF]	JT	12/6/2023	P	\$15,001 - \$50,000	
Six Circles US Unconstrained Equity Fund (CUSUX) [MF]	JT	06/22/2023	P	\$1,001 - \$15,000	
Six Circles US Unconstrained Equity Fund (CUSUX) [MF]	JT	12/15/2023	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvestment					
Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	JT	02/14/2023	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
Cooley LLP (Law Firm)	Spouse Salary	N/A

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	PNC Bank	09/2020	Mortgage on Personal Residence; Dallas, Texas	\$250,001 - \$500,000

**SCHEDULE E: POSITIONS**

None disclosed.

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
December 2007	Filer and NFL	As reported and described on Schedule A, filer is an inactive participant in the following retirement and annuity plans associated with his time as a player in the NFL: Bert Bell/Pete Rozelle NFL Player Retirement Plan; NFL Player Second Career Savings Plan 401K; and NFL Player Annuity Program Trust.
May 2015	Filer and Perkins Coie (Law Firm)	As reported and described on Schedule A, filer is an inactive participant in the Perkins Coie Salary Deferral Plan.

**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**

<ul style="list-style-type: none"><li>◦ Cleary Gottlieb Fidelity Retirement Plan (Owner: SP)</li><li>◦ Cooley LLP Salary Deferral &amp; Profit Sharing Plan (Owner: SP)</li><li>◦ Legal Aid of NorthWest Texas 401K Thrift Plan (Owner: SP)</li><li>◦ NFL Player Second Career Savings Plan 401(k) Savings Plan</li><li>◦ Perkins Coie Salary Deferral Plan</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

## 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. Colin Allred , 05/15/2024