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Financial Disclosure Report

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Filer Information

Name: Hon. Pramila Jayapal
Status: Member
State/District: WA07

Filing Information

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/13/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Boeing Credit Union [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	☐
IRA ⇒ DFA Emerging Markets Social Core Equity Portfolio (DFESX) [MF]		$15,001 - $50,000	Tax-Deferred		☑
IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]		$50,001 - $100,000	Tax-Deferred		☐
IRA ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]		$50,001 - $100,000	Tax-Deferred		☑
IRA ⇒ DFA U.S. Social Core Equity 2 Portfolio (DFUEX) [MF]		$100,001 - $250,000	Tax-Deferred		☑
IRA ⇒ Dimensional ETF Trust Dimensional US Large Cap Value ETF (DFLV) [EF]		$100,001 - $250,000	Tax-Deferred		☑
IRA ⇒ Dimensional International Value ETF (DFIV) [EF]		$50,001 - $100,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
IRA ⇒ Money Market [BA]		$1,001 - $15,000	Tax-Deferred		☐
IRA ⇒ Vanguard Real Estate Index Fund Admiral Shares (VGSLX) [MF]		$50,001 - $100,000	Tax-Deferred		☐
Joint Tenancy ⇒ Dimensional ETF Trust Dimensional US Large Cap Value ETF (DFLV) [EF]	JT	None	Capital Gains	$201 - $1,000	☑
Joint Tenancy ⇒ Money Market [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	☐
Personal Account ⇒ Dimensional ETF Trust Dimensional U.S. Core Equity 2 ETF (DFAC) [EF]		None	Capital Gains, Dividends	$15,001 - $50,000	☑
Personal Account ⇒ Newell Brands Inc. (NWL) [ST]		None	Capital Gains	$1,001 - $2,500	☑
Roth IRA ⇒ DFA Emerging Markets Social Core Equity Portfolio (DFESX) [MF]		$15,001 - $50,000	Tax-Deferred		☐
Roth IRA ⇒ DFA Emerging Markets Social Core Equity Portfolio (DFESX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Roth IRA ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
SEP IRA ⇒ DFA U.S. Sustainability Core I Ptf (DFSIX) [MF]		$50,001 - $100,000	Tax-Deferred		☐
SEP IRA ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
SEP IRA ⇒ Dimensional ETF Trust Dimensional Global Real Estate ETF (DFGR) [EF]		$1,001 - $15,000	Tax-Deferred		☑
SEP IRA ⇒ Dimensional International Value ETF (DFIV) [EF]		$1,001 - $15,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Solo 401(k) ⇒ Avantis Real Estate ETF (AVRE) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Solo 401(k) ⇒ DFA U.S. Sustainability Core I Ptf (DFSIX) [MF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Solo 401(k) ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Solo 401(k) ⇒ DFA International Social Core Equity Portfolio Instl Class (DSCLX) [MF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Solo 401(k) ⇒ Dimensional ETF Trust Dimensional Global Real Estate ETF (DFGR) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Solo 401(k) ⇒ Dimensional ETF Trust Dimensional International Small Cap Value ETF (DISV) [EF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Solo 401(k) ⇒ Dimensional ETF Trust Dimensional US Large Cap Value ETF (DFLV) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Solo 401(k) ⇒ Dimensional ETF Trust Dimensional US Small Cap Value ETF (DFSV) [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Solo 401(k) ⇒ Dimensional International Value ETF (DFIV) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Solo 401(k) ⇒ Money Market [BA]	SP	$1,001 - $15,000	Tax-Deferred		☐
Sound Retirement Trust Pension [PE]	SP	Undetermined	None		☐
Teamsters Pension [PE]	SP	Undetermined	None		☐
UFCW Pension [PE]	SP	Undetermined	None		☐

* 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?
IRA ⇒ DFA Emerging Markets Social Core Equity Portfolio (DFESX) [MF]		01/13/2023	P	$1,001 - $15,000	
IRA ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]		01/20/2023	S (partial)	$50,001 - $100,000	☐
IRA ⇒ DFA Investment Grade Portfolio (DFAPX) [MF] Description: sold all shares		01/13/2023	S	$50,001 - $100,000	☐
IRA ⇒ DFA One-Year Fixed Income Pt. (DFIHX) [MF] Description: sold all shares		01/13/2023	S	$1,001 - $15,000	☐
IRA ⇒ DFA Two-Year Global Fixed Income Portfolio (DFGFX) [MF] Description: sold all shares		01/13/2023	S	$1,001 - $15,000	☐
IRA ⇒ DFA U.S. Social Core Equity 2 Portfolio (DFUEX) [MF]		01/20/2023	S (partial)	$15,001 - $50,000	☐
IRA ⇒ Dimensional Emerging Core Equity Market ETF (DFAE) [EF] Description: sold all shares		01/13/2023	S	$1,001 - $15,000	☐
IRA ⇒ Dimensional ETF Trust Dimensional US Large Cap Value ETF (DFLV) [EF]		07/13/2023	P	$1,001 - $15,000	
IRA ⇒ Dimensional ETF Trust Dimensional US Large Cap Value ETF (DFLV) [EF]		01/20/2023	P	$100,001 - $250,000	
IRA ⇒ Dimensional International Value ETF (DFIV) [EF]		01/20/2023	P	$50,001 - $100,000	
Joint Tenancy ⇒ Dimensional ETF Trust Dimensional U.S. Core Equity 2 ETF (DFAC) [EF] Description: sold all shares	JT	01/13/2023	S	$50,001 - $100,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Joint Tenancy ⇒ Dimensional ETF Trust Dimensional US Large Cap Value ETF (DFLV) [EF]	JT	01/13/2023	P	$50,001 - $100,000	
Joint Tenancy ⇒ Dimensional ETF Trust Dimensional US Large Cap Value ETF (DFLV) [EF]	JT	01/26/2023	S (partial)	$50,001 - $100,000	☑
Joint Tenancy ⇒ Dimensional ETF Trust Dimensional US Large Cap Value ETF (DFLV) [EF] DESCRIPTION: sold all remaining shares	JT	09/25/2023	S	$1,001 - $15,000	☐
Personal Account ⇒ Dimensional ETF Trust Dimensional U.S. Core Equity 2 ETF (DFAC) [EF]		03/17/2023	S (partial)	$15,001 - $50,000	☑
Personal Account ⇒ Dimensional ETF Trust Dimensional U.S. Core Equity 2 ETF (DFAC) [EF]		09/25/2023	S (partial)	$15,001 - $50,000	☑
Personal Account ⇒ Dimensional ETF Trust Dimensional U.S. Core Equity 2 ETF (DFAC) [EF] DESCRIPTION: sold all remaining shares		10/31/2023	S	$1,001 - $15,000	☑
Personal Account ⇒ Newell Brands Inc. (NWL) [ST] DESCRIPTION: sold all shares		10/31/2023	S	$1,001 - $15,000	☑
Roth IRA ⇒ DFA Emerging Markets Core Equity Portfolio (DFCEX) [MF] DESCRIPTION: sold all shares	SP	01/13/2023	S	$1,001 - $15,000	☐
Roth IRA ⇒ DFA Emerging Markets Social Core Equity Portfolio (DFESX) [MF]	SP	01/13/2023	P	$1,001 - $15,000	
Roth IRA ⇒ Dimensional Emerging Core Equity Market ETF (DFAE) [EF] DESCRIPTION: sold all shares	SP	01/13/2023	S	$1,001 - $15,000	☐
SEP IRA ⇒ Dimensional ETF Trust Dimensional Global Real Estate ETF (DFGR) [EF]		01/13/2023	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
SEP IRA ⇒ Dimensional International Value ETF (DFIV) [EF]		01/20/2023	P	$1,001 - $15,000	
SEP IRA ⇒ Vanguard GNMA Fund (VFIIX) [MF] DESCRIPTION: sold all shares		01/13/2023	S	$1,001 - $15,000	☐
Solo 401(k) ⇒ DFA U.S. Sustainability Core I Ptf (DFSIX) [MF] DESCRIPTION: sold all shares	SP	01/20/2023	S	$100,001 - $250,000	☐
Solo 401(k) ⇒ DFA International Real Estate Securities Ptf (DFITX) [MF] DESCRIPTION: sold all shares	SP	12/4/2023	S	$1,001 - $15,000	☐
Solo 401(k) ⇒ DFA International Social Core Equity Portfolio Instl Class (DSCLX) [MF]	SP	01/20/2023	S (partial)	$50,001 - $100,000	☐
Solo 401(k) ⇒ DFA International Social Core Equity Portfolio Instl Class (DSCLX) [MF]	SP	12/4/2023	S (partial)	$15,001 - $50,000	☐
Solo 401(k) ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF] DESCRIPTION: sold all shares	SP	12/4/2023	S	$1,001 - $15,000	☐
Solo 401(k) ⇒ DFA Investment Grade Portfolio (DFAPX) [MF] DESCRIPTION: sold all shares	SP	01/13/2023	S	$15,001 - $50,000	☐
Solo 401(k) ⇒ DFA One-Year Fixed Income Pt. (DFIHX) [MF] DESCRIPTION: sold all shares	SP	01/13/2023	S	$1,001 - $15,000	☐
Solo 401(k) ⇒ Dimensional Emerging Core Equity Market ETF (DFAE) [EF] DESCRIPTION: sold all shares	SP	01/13/2023	S	$1,001 - $15,000	☐
Solo 401(k) ⇒ Dimensional ETF Trust Dimensional Global Real Estate ETF (DFGR) [EF]	SP	12/4/2023	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Solo 401(k) ⇒ Dimensional ETF Trust Dimensional International Small Cap Value ETF (DISV) [EF]	SP	01/20/2023	P	$50,001 - $100,000	
Solo 401(k) ⇒ Dimensional ETF Trust Dimensional International Small Cap Value ETF (DISV) [EF]	SP	12/4/2023	S (partial)	$15,001 - $50,000	☐
Solo 401(k) ⇒ Dimensional ETF Trust Dimensional US Large Cap Value ETF (DFLV) [EF]	SP	07/13/2023	P	$1,001 - $15,000	
Solo 401(k) ⇒ Dimensional ETF Trust Dimensional US Small Cap Value ETF (DFSV) [EF]	SP	01/20/2023	P	$100,001 - $250,000	
Solo 401(k) ⇒ Dimensional International Core Equity Market ETF (DFAI) [EF] Description: sold all shares	SP	01/20/2023	S	$15,001 - $50,000	☐
Solo 401(k) ⇒ Dimensional International Value ETF (DFIV) [EF]	SP	01/20/2023	P	$15,001 - $50,000	
Solo 401(k) ⇒ Vanguard GNMA Fund (VFIIX) [MF] Description: sold all shares	SP	01/13/2023	S	$15,001 - $50,000	☐

* 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
Executive Director	Spouse employment wages	$90,000.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	BECU	May 2023	Residential Mortgage	$1,000,001 - $5,000,000
JT	Wells Fargo Bank, N.A	May 2017	Residential Mortgage	$500,001 -

Owner	Creditor	Date Incurred	Type	Amount of Liability
				$1,000,000
JT	Truist Home Mortgage	April 2018	Residential Mortgage	$250,001 - $500,000
JT	Alan Preston, Seattle, WA	October 2022	Bridge Loan	$1,000,001 - $5,000,000

Schedule E: Positions

Position	Name of Organization
Board Member	Congressional Progressive Caucus Center

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

- IRA
- Joint Tenancy (Owner: JT)
- Personal Account
- Roth IRA
- Roth IRA (Owner: SP)
- SEP IRA
- Solo 401(k) (Owner: SP)

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. Pramila Jayapal , 05/13/2024