



Filing ID #10060024

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. John P. Sarbanes
Status: Member
State/District: MD03

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?
American Funds Washington Mutual Investors Fund Class A [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Berkshire Bank [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Capital One Accounts [BA]	SP	\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Invesco Growth and Income Fund Y [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
MD College Investment Plan Portfolio 2015 [5P]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: MD					
T. Rowe Price Government Money Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
T. Rowe Price Spectrum Income [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA Traditional IRA [FN]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
U.S. Treasury Bonds [GS]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
U.S. Treasury Bonds [GS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Vanguard FTSE Social Index Fund Inv. Shares [MF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Target Retirement 2030 Fund (VTHR) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Bank Accounts [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Traditional IRA Retirement Savings Certificate [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

* 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?
Vanguard Target Retirement 2030 Fund (VTHR) [MF]	SP	03/8/2023	P	\$1,001 - \$15,000	

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Pittsfield Coop Bank	September 2019	Home Mortgage	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Directors (uncompensated)	YMCA of Central Maryland

SCHEDULE F: AGREEMENTS

None disclosed.

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?
SNF Agora Institute at Johns Hopkins University	06/17/2023	06/20/2023	Dulles, Virginia - Athens, Greece - Newark, NJ	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The Aspen Institute, Inc	08/24/2026		Baltimore, MD - Oslo, Norway - Bergen, Norway - Baltimore, MD	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
The Aspen Institute, Inc	02/21/2023	02/25/2023	Baltimore, MD - Cartagena, Colombia - Baltimore, MD	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.

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. John P. Sarbanes , 05/13/2024