



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Alexandria Ocasio-Cortez  
**Status:** Member  
**State/District:** NY14

## 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?
Allied Bank Savings Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Charles Schwab Bank Checking [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Charles Schwab One Brokerage [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
National Hispanic Institute Inc 401k Plan ⇒ PRUDENTIAL HIGH YIELD Z [MF]		\$1,001 - \$15,000	Tax-Deferred		<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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	U.S. Dept. of Education	August 2007 - May 2011	Student Loans	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2019	National Hispanic Institute Inc, Alexandria Ocasio Cortez	Continued participation in 401k plan.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Center for Economic and Policy Research	08/13/2023	08/22/2023	New York City, NY - Brasilia, Brazil - Santiago, Chile - Bogota, Colombia - New York City, NY	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The Maureen and Mike Mansfield Foundation/JEF	02/18/2023	02/26/2023	New York City, NY - Tokyo, Japan - Seoul, South Korea - New York City, NY	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- o National Hispanic Institute Inc 401k Plan

## 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. Alexandria Ocasio-Cortez , 08/13/2024