



Filing ID #10060414

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Pete Aguilar
Status: Member
State/District: CA33

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/7/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AAA Universal Life Insurance [WU]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Alta Vista Credit Union [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Arrowhead Credit Union [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Congressional Federal Credit Union [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
TIAA CREF ⇒ American Beacon Small Cap Value Fd Inst Cl (AVFIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA CREF ⇒ CREF Social Choice Account - R2 (QCSCPX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF ⇒ CREF Stock Account - R2 (QCSTPX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA CREF ⇒ Invesco Developing Markets Fund Class R6 (ODVIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA CREF ⇒ Janus Henderson Triton Fund - N Shares (JGMNX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA CREF ⇒ JPMorgan Equity Income Fund R6 (OIEJX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA CREF ⇒ MFS Mid Cap Value Fund Class R6 (MVCKX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA CREF ⇒ TIAA Traditional annuity [FN]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TIAA CREF ⇒ Vanguard Real Estate Index Fund Admiral Shares (VGSLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA CREF ⇒ Vanguard Total International Stock Index Fd Admiral (VTIAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA CREF ⇒ Vanguard Total Stock Market Index Fd Admiral Shs (VTSAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" 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?
TIAA CREF ⇒ American Beacon Small Cap Value Fd Inst Cl (AVFIX) [MF]	SP	10/27/2023	P	\$1,001 - \$15,000	
TIAA CREF ⇒ CREF Stock Account - R2 (QCSTPX) [MF]	SP	10/27/2023	P	\$15,001 - \$50,000	
TIAA CREF ⇒ Invesco Developing Markets Fund Class R6 (ODVIX) [MF]	SP	10/27/2023	P	\$1,001 - \$15,000	
TIAA CREF ⇒ Janus Henderson Triton Fund - N Shares (JGMNX) [MF]	SP	10/27/2023	P	\$1,001 - \$15,000	
TIAA CREF ⇒	SP	10/27/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
JPMorgan Equity Income Fund R6 (OIEJX) [MF]					
TIAA CREF ⇒ MFS Mid Cap Value Fund Class R6 (MVCKX) [MF]	SP	10/27/2023	P	\$1,001 - \$15,000	
TIAA CREF ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	10/27/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: Formerly TIAA-CREF Lifecycle Index 2045 Fund.					
TIAA CREF ⇒ Vanguard Real Estate Index Fund Admiral Shares (VGSLX) [MF]	SP	10/27/2023	P	\$1,001 - \$15,000	
TIAA CREF ⇒ Vanguard Total International Stock Index Fd Admiral (VTIAX) [MF]	SP	10/27/2023	P	\$15,001 - \$50,000	
TIAA CREF ⇒ Vanguard Total Stock Market Index Fd Admiral Shs (VTSAX) [MF]	SP	10/27/2023	P	\$1,001 - \$15,000	

* 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
University of Redlands	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	RoundPoint Mortgage Servicing Corporation	October 2012	Residential Home 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

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Educational Foundation	08/8/2023	08/13/2023	Los Angeles, CA - Jerusalem, Israel - Tiberias, Israel - Los Angeles, CA	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<div><div>o</div>TIAA CREF (Owner: SP) DESCRIPTION: Spouse 401K</div>

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. Pete Aguilar , 08/7/2024