



Filing ID #10061334

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Mark Takano
Status: Member
State/District: CA39

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/8/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alliant Credit Union [BA]		\$1 - \$1,000	None		<input type="checkbox"/>
Altura Credit Union [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
American Express Savings [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
California Public Employee Retirement System [DB]		Undetermined	None		<input type="checkbox"/>
California State Teacher Retirement System [DB]		Undetermined	None		<input type="checkbox"/>
Congressional Federal Credit Union [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
My 403b ⇒ MainStay Moderate Allocation Fund Class A (MMRAX) [MF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Transferred some of the assets value to a fixed annuity					
My 403b ⇒ NYL Secure Term Fixed Choice Annuity [FN]		\$100,001 - \$250,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase of Fixed annuity					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
New York Life Whole Life Policy [WU]		\$50,001 - \$100,000	None		<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?
My 403b ⇒ New York Life Flexible Premium Variable Annuity [VA]		04/19/2023	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
DESCRIPTION: Partial sale of variable annuity in order to purchase a fixed annuity					
My 403b ⇒ NYL Secure Term Choice Fixed Annuity [FN]		04/19/2023	P	\$100,001 - \$250,000	
DESCRIPTION: Purchase of fixed annuity from proceeds of sale of variable annuity					

* 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

None disclosed.

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	US-Japan Foundation
Board Member	Coders for Progress
Board Member	Dollars for Scholars
Board Member	Junior Statesmen of America
Board Member	Japanese American National Museum

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
September 1987	Self and the California State Retirement System	Continued Participation in retirement plan of previous employer
December 1990	Self and the California Public Employee Retirement System	Continued Participation in retirement plan of the previous employer

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

- My 403b

DESCRIPTION: New York Life Variable Annuity: Mainstay Moderate Allocation

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. Mark Takano , 08/8/2024