



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Earl Blumenauer  
**Status:** Former Member  
**State/District:** OR03

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2025  
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## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Acadian Emerging Markets Portfolio I Shares (AEMZX) [MF] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Accenture plc Class A Ordinary Shares (ACN) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Air Products and Chemicals, Inc. (APD) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Allstate Corporation (ALL) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Alphabet Inc. - Class A (GOOGL) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Amazon.com, Inc. - Common Stock (AMZN) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Amazon.Com,Inc.4.65%29Due 12/01/29 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Amgen Inc. (AMGN) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Apple Inc 3%27 Due11/13/27 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Apple Inc. (AAPL) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Astrazeneca PLC (AZN) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
AutoZone, Inc. (AZO) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Baillie Gifford Emerging Market Fund- Institutional Class (BEGGX) [MF] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Baird Ultra Short Bond Institutional [CS] DESCRIPTION: Part of financial portfolio.		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Bank of America [BA] DESCRIPTION: Part of my spouse's portfolio.	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank of America C Var 27 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Baxter International Inc. Common Stock (BAX) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
BECKER Value Equity Institutional [MF]		\$50,001 - \$100,000	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Berkshire Hathaway Inc. New (BRK.B) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
BlackRock, Inc. (BLK) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Part of my spouse's retirement portfolio.					
Brown Advisory Sustainable Growth Winslow [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Carrier Global Corporation (CARR) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Caterpillar Inc. 3.4% <sup>24</sup> Due 05/15/24 [CS]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Caterpillar, Inc. (CAT) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Charles Schwab Corporation (SCHW) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Chubb Limited (CB) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Ciena Corporation (CIEN) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Cisco Systems, Inc. (CSCO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Cohen & Steers Realty Share [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Comcast Corp 1.95% <sup>31</sup> [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Comcast Corp 4.65% <sup>33</sup> [CS]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Congressional Credit Union [BA]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Constellation BR 2.25% <sup>31</sup> Due 08/01/31 [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Part of my spouse's retirement portfolio.					
CVS Health Corporation (CVS) [ST]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Deere & Co 3.1%30 Due 04/15/30 [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
DFA US Large Cap Value [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Diageo plc Common Stock (DEO) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Duke Energy Progr 3.7%28 Due 09/01/28 [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Now listed as Progress Energy. Part of my spouse's retirement portfolio.					
Duplex - 6th St. SE [RP]		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Washington, DC, US					
ECOLAB Inc. 2.125% Due 02/01/32 [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Embraer S.A. (ERJ) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Emerson Electric Company (EMR) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Federal Thrift Savings Plan [BA]		\$1,000,001 - \$5,000,000	Tax-Deferred		<input type="checkbox"/>
FirstEnergy Corp. (FE) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Flex Ltd. - Ordinary Shares (FLEX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
General Dynamics Corporation (GD) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Part of my spouse's retirement portfolio.					
Gilead Sciences, Inc. (GILD) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Glisan Street Apts, 1701 NW Glisan [RP]		\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: Portland, OR, US					
DESCRIPTION: Partial ownership					
Goldman Sachs Group, Inc. (GS) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Goldman Sachs Inter 3%24 [CS]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Home Depot, Inc. (HD) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Honeywell International Inc. (HON) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
HP INC. 2.2%25 [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Interntl Busines 3.3%26 [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Ishares 1-3 Year Treasury Bond ETF [EF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ishares 1-3 Year Treasury Bond ETF [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					
iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [EF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares 3-7 Year Treasury Bond ETF (IEI) [EF] DESCRIPTION: Part of my spouse's portfolio.	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
iShares 3-7 Year Treasury Bond ETF (IEI) [EF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Ishares Core MSCI [EF] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
iShares Core MSCI Emerging Markets ETF (IEMG) [EF] DESCRIPTION: Part of my spouse's portfolio.	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Ishares Core S&P 500 ETF [EF] DESCRIPTION: Part of my spouse's portfolio.	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Ishares Core S&P 500 ETF [EF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ishares Core S&P Small [EF] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Ishares MSCI EAFE ETF [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ishares MSCI EAFE ETF [EF] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Ishares MSCI EAFE ETF [EF] DESCRIPTION: Part of my spouse's portfolio.	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Ishares TRT IS 5-10 Inv Gr ETF [EF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ishares TRT IS 5-10 Inv Gr ETF [EF] DESCRIPTION: Part of my spouse's portfolio.	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Johnson & Johnson (JNJ) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JP Morgan Chase & Co. (JPM) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JPMorgan Chase & Var 35 Due 04/22/35 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Key Corp 4.1%28 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Koninklijke Philips N.V. NY Registry Shares (PHG) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Kroger Company (KR) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Lamb Weston Holdings, Inc. (LW) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Magna International, Inc. (MGA) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
McKesson Corporation (MCK) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Medtronic plc. Ordinary Shares (MDT) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Microsoft Corp 2.875%24 Due 02/06/24 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Microsoft Corporation (MSFT) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Molina Healthcare Inc Common Stock (MOH) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley 4%25 Due 07/23/25 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Newmont Goldcorp Corporation (NEM) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Nextracker Inc. - Class A Common Stock (NXT) [ST] DESCRIPTION: Part of my spouse's retirement portfolio. NOTE: This was a spinoff from Flex Ltd F	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Nike, Inc. 2.375% 11/1/26 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Nike, Inc. Common Stock (NKE) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Northwest Natural Holding Company (NWN) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
Northwest Natural Holding Company [PE] DESCRIPTION: Spouse pension	SP	Undetermined	None		<input type="checkbox"/>
OnPoint Community Credit Union [BA]		\$250,001 - \$500,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Oregon Public Employees Retirement System [PE]		Undetermined	None		<input type="checkbox"/>
PayPal Holdings 4.4%32 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Pfizer, Inc. (PFE) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
PIMCO International Bond Fund [EF] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
PIMCO Total Return III Fund [EF] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Procter & Gamble Company (PG) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
QUALCOMM Incorporated (QCOM) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>



Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Part of my spouse's retirement portfolio.					
Quest Diagnostics Incorporated (DGX) [ST]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Realty Income Corp Reit [RE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
RTX Corporation Common Stock (RTX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio. Formerly Raytheon Technologies Corporation					
Salesforce.com Inc (CRM) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Sanofi - American Depositary Shares (SNY) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
SAP SE ADS (SAP) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Schwab 1000 Index Fund [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Schwab Money Market [BA]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio					
Schwab Money Market [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Schwab S+P 500 Index Fd [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab SEP - IRA [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Siemens AG American Depositary Shares (SIEGY) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Southern Company (SO) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Starbucks Corporation (SBUX) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SVB Financial Group (SIVB) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Sysco Corporation Common Stock (SYY) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Target Corp 2.35%30 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Target Corp 3.375%29 Due 04/15/29 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
TE Connectivity Ltd. New Switzerland Registered Shares (TEL) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
The Allstate Cor 1.45%30 Due 12/15/30 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
The Blackstone Group Inc. (BX) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
The Goldman Sachs Var 33 Due 02/24/33 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
The Kroger Co. 4.5% 29 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
The Procter & Gamble 3%30 Due3/25/30 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Thermo Fisher SC 1.75%/28 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Townhouse 2441 NE Weidler [RP] LOCATION: Portland, OR, US	SP	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Toyota Motor Credit 3%/25 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Toyota Motor Credit 3%25 Due 04/01/25 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Truist Bank 1.5%/25 Due3/10/25 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
U.S. Bancorp (USB) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Unilever PLC (UL) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
United Health Gro 3.75%25 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
US Treas NT 4.5% 11/33 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
US Treasu NT 2.125%07/24 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input type="checkbox"/>
US Treasu NT 3.125% Due 8/31/27 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
US Treasu NT 3.625%03/30 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
US Treasu Nt 4.125% UST Due 03/31/29 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
US Treasu NT 4.625%02/26 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
US Treasu NT 4.625%04/31 [GS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
US Treasur 2.375% 05/29 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
US TREASUR NT 2.25%03/26 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
US Treasur NT 2.25%11/24 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input type="checkbox"/>
US Treasur NT 2.25%11/25 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
US Treasur NT 2.375%04/26 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
US Treasur NT 2.5%05/24 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input type="checkbox"/>
US Treasur NT 2.75% 02/28 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
US Treasur Nt 2.75%08/32 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
US TREASUR NT 3.5%02/33 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
US Treasur NT 4%01/27 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
US Treasur NT 4.25%05/25 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
US Treasury 5.375%02/31UST Bond [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
US Treasury Bill 02/22/24 [GS]		None	Interest	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
US Treasury Bill 05/02/24 [GS]		None	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
US Treasury Bill 24 Due 06/13/24 [GS]		None	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
US Treasury Bill 24 Due 07/25/24 [GS]		None	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
US Treasury Bill 24 Due 10/3/24 [GS]		None	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
US Treasury Bill 25 Due 02/06/25 [GS]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
US Treasury Bill 25 Due 03/27/25 [GS]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
US Treasury Bill Due 01/11/24 [GS]		None	Interest	\$201 - \$1,000	<input type="checkbox"/>
US Treasury Bill Due 02/04/25 [GS]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
US Treasury Bill Due 03/21/24 [GS]		None	Interest	\$201 - \$1,000	<input type="checkbox"/>
US Treasury Bill Due 04/10/25 [GS]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
US TREASURY Bill Due 04/18/24 [GS]		None	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
US Treasury Bill Due 04/25/24 [GS]		None	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
US Treasury Bill Due 05/16/24 [GS]		None	Interest	\$201 - \$1,000	<input type="checkbox"/>
US Treasury Bill Due 06/12/25 [GS]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
US Treasury Bill Due 09/04/25 [GS]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
US Treasury Bill Due 09/17/24 [GS]		None	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
US Treasury Bill Due 10/31/24 [GS]		None	Interest	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
US Treasury Bill Due 11/26/24 [GS]		None	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
US Treasury Bill Due 12/12/24 [GS]		None	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
US Treasury Bill Due 12/26/24 [GS]		None	Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
US Treasury Bill24 Due 07/11/24 [GS]		None	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vacation House [RP]	SP	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Deer Isle, ME, US					
Vanguard FTSE Developed MATS [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Vanguard FTSE Emerging MARK [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Vanguard FTSE Europe [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Vanguard Growth ETF [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Vanguard Growth ETF [EF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					
Vanguard Real Estate ETF [EF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					
Vanguard Real Estate ETF [EF]		None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Vanguard Short Term Inv Grade Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Vanguard TOTAL Stock Market E [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard TOTAL Stock Market ETF [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard TOTAL Stock Market ETF [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Value ETF (VTV) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					
Vanguard Value ETF [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Ventas, Inc. (VTR) [ST]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Verizon Communications Inc. (VZ) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Visa Inc. (V) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Visa Inc. (V) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Vote19 LLC [OT]		\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: Partial ownership of building at 9125 North Bradford Street.					
Walmart Inc. (WMT) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Walt Disney Company (DIS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Warner Bros. Discovery, Inc. - Series A (WBD) [ST]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Wells Fargo & Co Var 29 Due 07/25/29 [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Weyerhaeuser Co. [RE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					

\* 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?
Acadian Emerging Markets Portfolio I Shares (AEMZX) [MF] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	08/30/2024	P	\$15,001 - \$50,000	
Alphabet Inc. - Class A Common Stock (GOOGL) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	02/1/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Amazon.com, Inc. - Common Stock (AMZN) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	02/12/2024	P	\$15,001 - \$50,000	
Baillie Gifford Emerging Market Fund- Institutional Class (BEGEX) [MF] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	08/30/2024	P	\$15,001 - \$50,000	
Bank of America C Var 27 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	11/8/2024	P	\$15,001 - \$50,000	
Baxter International Inc. Common Stock (BAX) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	07/9/2024	P	\$15,001 - \$50,000	
Becker Value Equity Institutional [HE]		06/21/2024	P	\$1,001 - \$15,000	
Blackstone Inc. Common Stock (BX) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	04/4/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Caterpillar Inc. 3.4% Due 05/15/24 [CS] DESCRIPTION: Full redemption. Part of my spouse's retirement portfolio.	SP	05/15/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Caterpillar, Inc. Common Stock (CAT) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	04/4/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Comcast Corp 1.95%31 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	11/21/2024	P	\$15,001 - \$50,000	
Comcast Corp 4.65%33 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	11/21/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Constellation BR 2.25%31 Due 08/01/31 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	10/11/2024	P	\$15,001 - \$50,000	
CVS Health Corporation Common Stock (CVS) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	06/27/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
DFA U.S. Large Cap Value Portfolio (DFLVX) [MF] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	11/22/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
ECOLAB Inc. 2.125% Due 02/01/32 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	05/17/2024	P	\$15,001 - \$50,000	
Embraer S.A. Common Stock (ERJ) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	04/4/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Goldman Sachs Inter 3%24 [CS] DESCRIPTION: Full redemption. Part of my spouse's retirement portfolio.	SP	03/15/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Honeywell International Inc. (HON) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	12/3/2024	P	\$15,001 - \$50,000	
iShares 1-3 Year Treasury Bond ETF (SHY) [EF]		12/24/2024	P	\$1,001 - \$15,000	
iShares 1-3 Year Treasury Bond ETF (SHY) [EF] DESCRIPTION: Part of my spouse's portfolio.	SP	01/29/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares 1-3 Year Treasury Bond ETF (SHY) [EF] DESCRIPTION: Part of my spouse's portfolio.	SP	03/20/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares 1-3 Year Treasury Bond ETF (SHY) [EF] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	08/13/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [EF]		12/24/2024	P	\$15,001 - \$50,000	
iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [EF]	SP	08/13/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Part of my spouse's retirement portfolio.					
iShares 3-7 Year Treasury Bond ETF (IEI) [EF]		12/24/2024	P	\$15,001 - \$50,000	
iShares 3-7 Year Treasury Bond ETF (IEI) [EF]	SP	08/13/2024	P	\$15,001 - \$50,000	
DESCRIPTION: Part of my spouse's portfolio.					
iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]		12/24/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]	SP	01/29/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					
iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]	SP	03/20/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					
iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]	SP	08/13/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					
iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		06/21/2024	P	\$1,001 - \$15,000	
iShares Core S&P 500 ETF (IVV) [EF]		05/16/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
iShares Core S&P 500 ETF (IVV) [EF]	SP	05/2/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					
iShares MSCI EAFE ETF (EFA) [EF]	SP	01/4/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Part of my spouse's retirement portfolio.					
iShares MSCI EAFE ETF (EFA) [EF]		05/16/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares MSCI EAFE ETF (EFA) [EF]		06/21/2024	P	\$1,001 - \$15,000	
JPMorgan Chase & Var 35 Due 04/22/35 [CS]	SP	05/17/2024	P	\$15,001 - \$50,000	
DESCRIPTION: Part of my spouse's retirement portfolio.					
Koninklijke Philips N.V. NY Registry Shares (PHG) [ST]	SP	02/12/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Part of my spouse's retirement portfolio.					
Kroger Company (KR) [ST]	SP	04/4/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Magna International, Inc. Common Stock (MGA) [ST]	SP	04/4/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
McKesson Corporation Common Stock (MCK) [ST]	SP	04/4/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Medtronic plc. Ordinary Shares (MDT) [ST]	SP	07/9/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Microsoft Corp 2.875%24 Due 02/06/24 [CS]	SP	02/6/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Full redemption. Part of my spouse's retirement portfolio.					
Nike, Inc. Common Stock (NKE) [ST]	SP	04/4/2024	P	\$15,001 - \$50,000	
DESCRIPTION: Part of my spouse's retirement portfolio.					
Northwest Natural Holding Company Common Stock (NWN) [ST]	SP	02/15/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment. Part of my spouse's retirement portfolio.					
Northwest Natural Holding Company Common Stock (NWN) [ST]	SP	05/15/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment. Part of my spouse's retirement portfolio.					
Northwest Natural Holding Company Common Stock (NWN) [ST]	SP	08/15/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment. Part of my spouse's retirement portfolio.					
Northwest Natural Holding Company Common Stock (NWN) [ST]	SP	11/15/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment. Part of my spouse's retirement portfolio.					
Pfizer, Inc. Common Stock (PFE) [ST]	SP	02/12/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Part of my spouse's retirement portfolio.					
QUALCOMM Incorporated - Common Stock (QCOM) [ST]	SP	02/12/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Part of my spouse's retirement portfolio.					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Quest Diagnostics Incorporated Common Stock (DGX) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	04/4/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
RTX Corporation Common Stock (RTX) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	04/4/2024	P	\$1,001 - \$15,000	
Southern Company (SO) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	04/4/2024	P	\$15,001 - \$50,000	
Target Corp 2.35%30 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	09/26/2024	P	\$15,001 - \$50,000	
Target Corp 3.375%29 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	09/26/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
TE Connectivity Ltd. New Switzerland Registered Shares (TEL) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	04/4/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
The Goldman Sachs Var 33 Due 02/24/33 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	04/4/2024	P	\$15,001 - \$50,000	
The Kroger Co. 4.5% 29 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	11/8/2024	P	\$15,001 - \$50,000	
Toyota Motor Credit 3%/25 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	11/8/2024	S	\$50,001 - \$100,000	<input type="checkbox"/>
Unilever PLC Common Stock (UL) [ST] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	02/12/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
UnitedHealth Gro 3.75%25 [CS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	10/11/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
US Treasu Nt 4.125% UST Due 03/31/29 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	10/21/2024	P	\$15,001 - \$50,000	
US Treasu NT 4.625% Due 04/30/31 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	10/21/2024	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
US Treasu NT 4.625%02/26 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	11/19/2024	P	\$15,001 - \$50,000	
US Treasu NT 4.625%04/31 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	06/7/2024	P	\$15,001 - \$50,000	
US Treasur Nt 2.75%08/32 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	08/29/2024	P	\$15,001 - \$50,000	
US Treasur Nt 3.625% Due 03/31/30 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	05/17/2024	P	\$15,001 - \$50,000	
US Treasur NT 4%01/27 [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	11/19/2024	P	\$15,001 - \$50,000	
US Treasury 5.375%02/31UST Bond [GS] DESCRIPTION: Part of my spouse's retirement portfolio.	SP	06/7/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
US Treasury Bil25 Due 02/06/25 [GS]		12/30/2024	P	\$15,001 - \$50,000	
US Treasury Bill 04/25/24 [GS]		03/27/2024	P	\$15,001 - \$50,000	
US Treasury Bill 05/02/24 [GS]		03/27/2024	P	\$15,001 - \$50,000	
US Treasury Bill 24 Due 06/13/24 [GS]		04/30/2024	P	\$15,001 - \$50,000	
US Treasury Bill 25 Due 03/27/25 [GS]		12/30/2024	P	\$15,001 - \$50,000	
US Treasury Bill Due 02/04/25 [GS]		10/15/2024	P	\$15,001 - \$50,000	
US Treasury Bill Due 04/10/25 [GS]		10/15/2024	P	\$15,001 - \$50,000	
US Treasury Bill Due 06/12/25 [GS]		07/12/2024	P	\$15,001 - \$50,000	
US Treasury Bill Due 07/11/24 [GS]		05/17/2024	P	\$15,001 - \$50,000	
US Treasury Bill Due 09/04/25 [GS]		09/13/2024	P	\$1,001 - \$15,000	
US Treasury Bill Due 09/17/24 [GS]		07/26/2024	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
US Treasury Bill Due 11/26/24 [GS]		09/27/2024	P	\$15,001 - \$50,000	
US Treasury Bill Due 12/12/24 [GS]		09/27/2024	P	\$15,001 - \$50,000	
US Treasury Bill Due 12/26/24 [GS]		06/21/2024	P	\$15,001 - \$50,000	
US Treasury Bill <sup>24</sup> Due 07/25/24 [GS]		04/30/2024	P	\$15,001 - \$50,000	
US Treasury Due 10/03/24 [GS]		05/17/2024	P	\$15,001 - \$50,000	
Vanguard FTSE Developed Markets ETF (VEA) [EF]		11/13/2024	P	\$1,001 - \$15,000	
Vanguard FTSE Emerging Markets ETF (VWO) [EF]		11/13/2024	P	\$1,001 - \$15,000	
Vanguard FTSE European ETF (VGK) [EF]	SP	01/4/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Vanguard Growth ETF (VUG) [EF]		05/16/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Growth ETF (VUG) [EF]		06/21/2024	P	\$1,001 - \$15,000	
Vanguard Real Estate ETF (VNQ) [EF]		05/16/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Real Estate ETF (VNQ) [EF]	SP	05/2/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Total Stock Market ETF (VTI) [EF]		11/13/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard Total Stock Market ETF (VTI) [EF]	SP	06/21/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					
Vanguard Total Stock Market ETF (VTI) [EF]		06/21/2024	P	\$1,001 - \$15,000	
Vanguard Value ETF (VTV) [EF]	SP	01/4/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					
Vanguard Value ETF (VTV) [EF]		05/16/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
			(partial)		
Vanguard Value ETF (VTV) [EF]	SP	05/2/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's portfolio.					
Ventas, Inc. Common Stock (VTR) [ST]	SP	09/19/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Visa Inc. (V) [ST]	SP	04/4/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Part of my spouse's retirement portfolio.					
Warner Bros. Discovery, Inc. - Series A Common Stock (WBD) [ST]	SP	07/9/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Part of my spouse's retirement portfolio.					
Wells Fargo & Co Var 29 Due 07/25/29 [CS]	SP	04/4/2024	P	\$15,001 - \$50,000	
DESCRIPTION: Part of my spouse's retirement portfolio.					

\* 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
Oregon Public Employees Retirement System	Pension	\$48,044.51
Charles Schwab	Spouse retirement distribution	N/A
NW Natural Holding Co.	Spouse pension	N/A
Charles Schwab	Retirement distribution	\$4,490.10

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	JP Morgan Chase Bank, Texas	April, 2018	Mortgage for 1701 NW Glisan	\$50,001 - \$100,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Member of the Board of Directors (uncompensated)	Mpact
Owner/Manager (uncompensated)	Vote19 LLC

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 1996	Earl Blumenauer and the State of Oregon	Participant in defined benefit 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?
Aspen Institute	02/17/2024	02/27/2024	Washington, DC - Cape Town, South Africa - Washington, D. C.	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Community Streetcar Coalition	04/7/2024	04/8/2024	Portland, OR - Charlotte, NC - Washington, D. C.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Aspen Institute	08/6/2024	08/16/2024	Portland, OR - Dublin, Ireland - Belfast, Northern Ireland - Boston, MA	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.

## 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. Earl Blumenauer , 01/29/2025