



Filing ID #10078282

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Ted Lieu
Status: Member
State/District: CA36

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/13/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
3148/Large Cap Growth Fund - A [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
3159 / Equity Index Fund - A [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Alight Money Market [MF]		\$1,001 - \$15,000	Interest	\$1 - \$200	☐
Apartment [RP]		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	☐
LOCATION: Baldwin Park, CA, US					
Capital World Growth & Income [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Fidelity 500 Index Fund (FXAIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Invesco Stable Value Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Kinecta Account for Austin Lieu [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Kinecta Account for Betty Lieu [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	☐
Mondrian International Value [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Nationwide Core Plus Bond Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Northern Trust Govt Short Term Investment Fund [GS]		\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	☐
One unit of office space in Monterey Park CA [RP]		\$250,001 - \$500,000	Capital Gains	\$131,432.00	☒
LOCATION: Monterey Park, CA, US DESCRIPTION: This office unit was sold on June 16, 2025 for \$440,000.					
PACE Global Fixed Income Fund [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	☐
PIMCO Diversified Income Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
PIMCO Investment Grade Credit [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Pudential Core Plus Bond Fund [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	☐
SD Window [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
SSGA S&P 500 Index Fund [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	☐
The Growth Fund of America [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
U.S. Government Securities Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
UBS International Sustainable Equity [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Vanguard Target Retirement 2030 [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Virtus NFJ Dividend Value Fund [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	☐
Washington Mutual Investors Fund [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Wells Fargo Account for Austin Lieu [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	☐
Wells Fargo PMA Bank Accounts [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	☐

* 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?
One unit of office space in Monterey Park CA [RP]		07/16/2025	S	\$250,001 - \$500,000	☒
LOCATION: Monterey Park, CA, US					

* 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
Torrance Unified School District	Spouse	\$4,800.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
DC	Various college loan firms	2024 and 2025	college loans	\$100,001 - \$250,000

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?
Aspen Institute	05/23/2025	05/31/2025	Los Angeles - Malaga, Spain - Seville, Spain - Los Angeles	3	☒	☒	☒
Aspen Institute	08/08/2025	08/18/2025	Los Angeles - Zambia - Botswana - Zambia - Los Angeles	3	☒	☒	☒

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. Ted Lieu , 08/13/2026