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Financial Disclosure Report

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Filer Information

Name: Hon. Rick Larsen
Status: Member
State/District: WA02

Filing Information

Filing Type: Annual Report
Filing Year: 2022
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Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Ameriprise Financial One Account/CNL Healthcare Inc (widely diversified property investment fund) [RE]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Ameriprise One Financial Account/Ameriprise Insured Money Market [BA] Description: Money market account within the Ameriprise One Financial Account	JT	$1,001 - $15,000	Interest	$5.26	☐
Ameriprise One Financial Account/Corporate Property Associates 18 Global Inc Cl A (widely diversifie [RE] Description: Asset managers sold this fund in August 2022; $3k in proceeds were invested into mutual funds in the jointly held revocable trust mutual funds holdings Although CPA18 does not exist in our portfolio any longer, showing its disposition. Will not be on CY23 report.	JT	None	Dividends	None	☑
Ameriprise One Financial Account/Western Asset Intermediate Term Municipal Cl A [MF]	JT	$1 - $1,000	Dividends	None	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ ACC Cash Reserve Certificate [BA] Description: Moved balance ($1,001) into ONE Account. End value is 0. Keeping in portfolio for possible future use	JT	None	Interest	$.04	☑
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 1/Ameriprise Insured Money Market [BA] Description: Part of the Ameriprise SPS Advisor Fund within the RT.	JT	$1,001 - $15,000	Interest	$4.16	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 1/Columbia Strategic Muni Income Institutional [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 1/Invesco Rochester Municipal Opptys Cl Y [MF] DESCRIPTION: purchased from sale of Eaton Vance asset	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 1/Invesco Steelpath MLP Alpha C [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 1/John Hancock Municipal Opportunity CL F [MF] DESCRIPTION: purchased in 2022 Reflected in Schedule B	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☑
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 1/Mainstay Cushing MLP Premier Class I [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 1/Mainstay Mackay Tax Free Bond Class I [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 1/Nuveen Strategic Municipal Opportunity CL I [MF] DESCRIPTION: Purchased in 2022 Reflected in Schedule B	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☑
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 1/PGIM Jennison MLP Class Z [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 2/American Century Small Cap Growth Cl I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	$1,001 - $15,000	Dividends	$1 - $200	☑
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 2/Calvert Equity Institutional Cl I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	$1,001 - $15,000	None		☑
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 2/Fidelity	JT	$1,001 - $15,000	Dividends	None	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Advisor International Growth CL I [MF]					
DESCRIPTION: Asset manager rebalanced mutual fund mix in this account					
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 2/JP Morgan Emerging Markets Equity Cl I [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	☐
DESCRIPTION: used 30k from ACC Cash Reserve certificate to create additional SPS managed account					
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 2/JP Morgan Mid Cap CL I [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	☑
DESCRIPTION: Asset manager rebalanced mutual fund mix in this account					
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 2/MFS GrowthCl I [MF]	JT	$1,001 - $15,000	Dividends, Interest	None	☑
DESCRIPTION: Manager rebalanced mutual funds in this account					
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Service Advisor Fund 2/PGIM Jennison International Opportunity Cl Z [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	☑
DESCRIPTION: Asset manager rebalanced mutual fund mix in this account					
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Condo Property, Everett WA [RP]	JT	$250,001 - $500,000	None		☐
LOCATION: Everett, WA, US DESCRIPTION: Created Revocable Living Trust on March 18, 2018. Moved Everett property to the RLT on March 27, 2018					
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Federal Congressional Credit Union/Money Market Account [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	☐
Richard R Larsen IRA ⇒ Ameriprise Brokerage Account/Ameriprise Insured Money Market [BA]		None	None		☐
DESCRIPTION: Money market account within IRA					
Richard R Larsen IRA ⇒ Ameriprise Brokerage/Ares Industrial REIT Inc Cl T [RE]		$15,001 - $50,000	None		☑
Richard R Larsen IRA ⇒ Essex Property Trust, Inc. (ESS) [ST]		$1,001 - $15,000	Dividends	$1 - $200	☑
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒		$1,001 - $15,000	Dividends	$1 -	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
ProLogis, Inc. (PLD) [ST]				$200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Prudential Financial, Inc. (PRU) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Abbott Laboratories (ABT) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Allstate Corporation (ALL) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ American Water Works Company, Inc. (AWK) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Amgen Inc. (AMGN) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Analog Devices, Inc. (ADI) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Apple Inc. (AAPL) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ BlackRock, Inc. (BLK) [ST]		$1 - $1,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒		$1,001 - $15,000	Dividends	$1 -	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Booz Allen Hamilton Holding Corporation (BAH) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset				$200	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Bristol-Myers Squibb Company (BMY) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Broadcom Inc. (AVGO) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Comcast Corporation - Class A (CMCSA) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Costco Wholesale Corporation (COST) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ EOG Resources, Inc. (EOG) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Hartford Financial Services Group, Inc. (HIG) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Home Depot, Inc. (HD) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ JP Morgan Chase & Co. (JPM) [ST] DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset		$1 - $1,000	Dividends	$1 - $200	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒		$1,001 - $15,000	Dividends	$1 -	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Merck & Company, Inc. Common Stock (MRK) [ST]				$200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Microsoft Corporation (MSFT) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Nasdaq, Inc. (NDAQ) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ NextEra Energy, Inc. (NEE) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Pioneer Natural Resources Company (PXD) [ST]		$1 - $1,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Stryker Corporation (SYK) [ST]		$1 - $1,000	Dividends	$1 - $200	✓
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Target Corporation (TGT) [ST]		$1,001 - $15,000	Dividends	$1 - $200	✓
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ The Hershey Company (HSY) [ST]		$1,001 - $15,000	Dividends	$1 - $200	✓
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒		$1,001 - $15,000	Dividends	$1 -	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
TJX Companies, Inc. (TJX) [ST]				$200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ United Parcel Service, Inc. (UPS) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		$1,001 - $15,000	Dividends	$1 - $200	✓
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Visa Inc. (V) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Waste Management, Inc. (WM) [ST]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset					
Richard R Larsen Roth IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Allspring Special Small Cap Value Institutional [MF]		$1,001 - $15,000	Dividends	$1 - $200	
DESCRIPTION: Name change of fund from a Wells Fargo fund to Allspring reflected in Transactions report					
Richard R Larsen Roth IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/American Century Mid Cap Value Cl I [MF]		$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen Roth IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Ameriprise Bank Insured Sweep Account [BA]		$1,001 - $15,000	Interest	$2.68	
Richard R Larsen Roth IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Artisan Small Cap Investor Cl I [MF]		$1,001 - $15,000	None		
Richard R Larsen Roth IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Delaware Small Cap Core Cl I [MF]		$1,001 - $15,000	Dividends	$1 - $200	
Richard R Larsen Roth IRA ⇒		$1,001 - $15,000	Dividends	$1 -	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Ameriprise Strategic Portfolio Service Advisor Fund/Value Line Mid Cap Focused Institutional [MF]				$200	
Richard R Larsen Roth IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Virtus Kar Mid Cap Growth Cl I [MF]		$1,001 - $15,000	None		
Riversource indexed universal life insurance/S&P 500 Indexed Account [WU] Description: $350 monthly premium for life insurance totalling $4200 annually		$100,001 - $250,000	None		✓
Riversource RAVA 5 Advantage Variable Annuity/VP Moderate Portfolio Class 2 [MF] Description: Annuity that holds mutual fund. Retirement asset		$1,001 - $15,000	None		
Tiia Ingrid Karlen IRA ⇒ Ameriprise Strategic Portfolio Advisor Fund/Fidelity Advisor Intl Small Cap Cl I [MF]		$1,001 - $15,000	None		✓
Tiia Ingrid Karlen IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Ameriprise Bank Insured Sweep Account [BA]		$1 - $1,000	None		
Tiia Ingrid Karlen IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Clearbridge Select Cl I [MF]		$1,001 - $15,000	None		
Tiia Ingrid Karlen IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Fidelity Advisor Growth Opptys Cl I [MF]		$1,001 - $15,000	None		
Tiia Ingrid Karlen IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/WCM Focused Emerging Markets Instl Cl [MF] Description: Asset created from sale of spouse TSCA		$1,001 - $15,000	None		
Tiia Ingrid Karlen IRA ⇒ Ameriprise Strategic Portfolio Service Advisor/American Century Focused Dynamic Growth Cl I [MF]		$1,001 - $15,000	None		
Tiia Ingrid Karlen IRA ⇒ Ameriprise Strategic Portfolio Service Advisor/Invesco Discovery CL Y [MF]		$1,001 - $15,000	None		
Tiia Ingrid Karlen IRA ⇒ Ameriprise Strategic Portfolio Service Advisor/Invesco Global Opptys Cl Y [MF]		$1,001 - $15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Tiia Ingrid Karlen Roth IRA ⇒ Ameriprise Insured Money Market Account [MF]		$1 - $1,000	None		
Tiia Ingrid Karlen Roth IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Clearbridge Intl Growth Cl I [MF] DESCRIPTION: income reinvested back into asset		$1,001 - $15,000	Dividends	$1 - $200	
Tiia Ingrid Karlen Roth IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Fidelity Advisor Intl Small Cap Cl I [MF] DESCRIPTION: income reinvested back into asset		$1,001 - $15,000	Dividends	$1 - $200	
Tiia Ingrid Karlen Roth IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Invesco Itnl Small Mid Company Cl Y [MF] DESCRIPTION: income reinvested into asset		$1,001 - $15,000	Dividends	$1 - $200	
Tiia Ingrid Karlen Roth IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/Janus Henderson Global Equity Income Class I [MF] DESCRIPTION: income reinvested back into asset		$1,001 - $15,000	Dividends	$201 - $1,000	
Tiia Ingrid Karlen Roth IRA ⇒ Ameriprise Strategic Portfolio Service Advisor Fund/PGIM Jennison Intl Opportunities Cl Z [MF] DESCRIPTION: income reinvested back into asset		$1,001 - $15,000	Dividends	None	

* Asset class 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?
Ameriprise One Account [BA] DESCRIPTION: closed Cash Reserve Certificate and moved amount to One Account	JT	05/16/2022	P	$1,001 - $15,000	
Ameriprise One Account/Corporate Property Associates 18 Global Inc Cl A [RE] DESCRIPTION: Asset managers sold the CPA 18. Proceeds distributed evenly into R Larsen and T Karlen Revocable Trust SPS Advisor mutual funds	JT	08/2/2022	S	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒	JT	05/16/2022	S	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
ACC Cash Reserve Certificate [BA] DESCRIPTION: Moved remaining amount in certificate to One Account. Reporting as sale, but not sure it is a sale as much as it just closing the reserve certificate and moving the remaining amount to the ONE account					
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 1/GS Dynamic Muni Income Investor [MF]	JT	07/7/2022	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 1/John Hancock Municipal Opportunity Cl I [MF]	JT	01/5/2022	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 1/Lord Abbett National Tax Free Income CL F [MF]	JT	01/6/2022	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 1/Nuveen Strategic Municipal Opportunity Cl I [MF]	JT	07/7/2022	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 2/American Century Focused Dynamic Growth CL I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	12/20/2022	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 2/American Century Small Cap Growth CL I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	12/20/2022	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 2/Calvert Equity Institutional CL I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	12/20/2022	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 2/Clearbridge Select Cl I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	12/20/2022	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 2/Federated Hermes Kaufmann Small Cap CL I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	12/20/2022	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒	JT	12/20/2022	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Ameriprise Strategic Portfolio Advisor Fund 2/Fidelity Advisor Growth Opportunity Cl I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account					
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 2/Fidelity Advisor International Growth Cl I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	12/20/2022	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 2/Invesco Global Opportunity CL I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	12/20/2022	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 2/JP Morgan Mid Cap Growth CL I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	12/20/2022	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 2/MFS Growth Cl I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	12/20/2022	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 2/PGIM Jennison International Opportunitys CL Z [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	12/20/2022	P	$1,001 - $15,000	
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Ameriprise Strategic Portfolio Advisor Fund 2/Virtus Kar International Small Cap Cl I [MF] DESCRIPTION: Asset manager rebalanced mutual fund mix in this account	JT	12/20/2022	S	$1,001 - $15,000	☐
Richard R Larsen IRA ⇒ Ameriprise Brokerage/Ares Industrial REIT Inc Cl T [IR] DESCRIPTION: Ares Management changed name of the Black Creek Industrial REIT		03/1/2022	E	$15,001 - $50,000	
Richard R Larsen IRA ⇒ Ameriprise Brokerage/Black Creek Industrial REIT Inc Cl T [IR] DESCRIPTION: Ares Management changed name to Ares Industrial REIT		03/1/2022	E	$15,001 - $50,000	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ AvalonBay Communities, Inc. (AVB) [ST] DESCRIPTION: rebalancing of portfolio per financial adviser		07/7/2022	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Best Buy Co., Inc. (BBY) [ST] DESCRIPTION: rebalancing of portfolio per financial adviser		10/5/2022	S	$1,001 - $15,000	☐
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Duke Realty Corporation (DRE) [ST] DESCRIPTION: Prologis acquired Duke Realty in October		10/5/2022	E	$915.00	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Essex Property Trust, Inc. (ESS) [ST] DESCRIPTION: rebalancing of portfolio per financial adviser		07/7/2022	P	$1,001 - $15,000	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Fastenal Company (FAST) [ST] DESCRIPTION: rebalancing of portfolio per financial adviser		01/6/2022	S	$1,001 - $15,000	☐
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Medtronic plc. Ordinary Shares (MDT) [ST] DESCRIPTION: rebalance of portfolio per financial advisor		01/5/2022	S	$869.00	☐
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Merck & Company, Inc. Common Stock (MRK) [ST] DESCRIPTION: rebalancing of portfolio per financial adviser		07/7/2022	P	$1,001 - $15,000	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ ProLogis, Inc. (PLD) [ST] DESCRIPTION: Prologis acquired Duke Realty In October		10/5/2022	E	$915.00	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Stryker Corporation (SYK) [ST] DESCRIPTION: rebalancing of portfolio per financial adviser		01/5/2022	P	$1,001 - $15,000	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Target Corporation (TGT) [ST] DESCRIPTION: asset purchase as part of portfolio rebalancing		10/5/2022	P	$1,001 - $15,000	
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Texas Instruments Incorporated (TXN) [ST] DESCRIPTION: rebalancing of portfolio per financial adviser		07/7/2022	S	$1,001 - $15,000	☐
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ The Hershey Company (HSY) [ST] DESCRIPTION: rebalancing of portfolio per financial adviser		10/5/2022	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ Tyson Foods, Inc. (TSN) [ST] DESCRIPTION: rebalancing of portfolio per financial adviser		10/5/2022	S	$945.00	☐
Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST] DESCRIPTION: rebalancing of portfolio per financial adviser		01/6/2022	P	$1,001 - $15,000	
Riversource indexed universal life insurance/S&P 500 Indexed Account [WU] DESCRIPTION: monthly premium		Monthly	P	$350.00	
Tiia Ingrid Karlen IRA ⇒ Ameriprise Strategic Portfolio Advisor Fund/Fidelity Advisor Intl Small Cap Cl I [MF] DESCRIPTION: Sale of Virtus fund and purchase of Fidelity fund within Tiia I Karlen IRA		06/15/2022	P	$1,001 - $15,000	
Tiia Ingrid Karlen IRA ⇒ Ameriprise Strategic Portfolio Advisor Fund/Virtus Kar Intl Mid Cap Cl I [MF] DESCRIPTION: Sale of Virtus and purchase of Fidelity Advisor within Tiia I Karlen IRA		06/15/2022	S	$1,001 - $15,000	☐

* Asset class 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
Personal Assistant/Bethesda United Methodist Church	Spouse	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	BAC Loans	December 2011	Mortgage for secondary residence	$250,001 - $500,000
SP	Shulman Rogers Law Firm	February 2022	Legal fees for work to close spouse's father's estate	$50,001 - $100,000

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 Congressional Program	05/31/2022	06/5/2022	Vilnius, Lithuania - Geneva, Switzerland - Washington, DC	0	✓	✓	✓
Aspen Institute Congressional Program	08/29/2022	09/2/2022	Seattle, WA - Reykjavik, IS - Seattle, WA	0	✓	✓	✓
The Ripon Society and the Franklin Center	11/9/2022	11/14/2022	Seattle, WA - Madrid, SP - Washington, DC	0	✓	✓	✓

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Asset Class Details

- Richard R Larsen and Tiia I Karlen Revocable Living Trust (Owner: JT)
  Description: Created Revocable Living Trust on March 18, 2018.
- Richard R Larsen IRA
- Richard R Larsen IRA ⇒ Ameriprise SPS Managed Account
- Richard R Larsen Roth IRA
- Tiia Ingrid Karlen IRA
- Tiia Ingrid Karlen Roth IRA

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. Rick Larsen , 07/7/2023