



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ruben Gallego  
**Status:** Member  
**State/District:** AZ03

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 08/12/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Aspiration Checking Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Aspiration Fund Adviser LLC [PS] DESCRIPTION: Investment in company		\$15,001 - \$50,000	None		<input type="checkbox"/>
Chase Bank Checking Account [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
IRA Club ⇒ NameCoach Inc. [CS] DESCRIPTION: Convertible Note		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
National Association of Realtors 401K ⇒ T Rowe Price Retirement 2055 Fund (TRRNX) [PE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
National Association of Realtors Pension Plan [DB]	SP	Undetermined	None		<input type="checkbox"/>
Rental of Real Property [RP] LOCATION: Phoenix, AZ, US DESCRIPTION: Member rented his primary residence for a total of \$19,802.05	JT	\$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?
UBS Simple IRA ⇒ JP Morgan Smart Retirement Fund 2055 (JFFCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
United Services Auto Association Checking Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>

\* 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?
Aspiration Redwood Fund [MF]		07/24/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Aspiration Redwood Fund [MF]		01/30/2022	P	\$1,001 - \$15,000	
Aspiration Redwood Fund [MF]		01/11/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
NameCoach, Inc. [CS] DESCRIPTION: Convertible Note		06/14/2022	P	\$15,001 - \$50,000	

\* 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
National Association of Realtors	Spouse Salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	USAA	June 2021	Personal Loan	\$10,000 - \$15,000
	American Express	June 2021	Revolving Credit Account	\$15,001 - \$50,000
	Citicard	June 2021	Revolving Credit Account	\$15,001 - \$50,000
JT	United Wholesale Mortgage	September 2021	Home Mortgage	\$500,001 - \$1,000,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
COMMENTS: Personal Residence was refinanced in 2021 with new lender United Wholesale Mortgage.				
JT	Newrez	August 2022	Home Mortgage	\$500,001 - \$1,000,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2008	Myself and City of Phoenix	Pension that will provide benefit upon retirement
March 2019	Spouse and National Association of Realtors	Pension that will provide benefit upon retirement.
August 2019	Myself and Aspirations Fund Adviser LLC	Invested personal funds in return for non-publicly traded shares.
September 2022	Myself and NameCoach Inc.	Invested personal funds in return for non-publicly traded shares.

## 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?
The Aspen Institute (Aspen Strategy Group)	07/20/2022	07/21/2022	Washington DC - Aspen - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- o IRA Club
- o National Association of Realtors 401K (Owner: SP)
- o UBS Simple IRA (Owner: SP)

## 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. Ruben Gallego , 08/12/2023