



Filing ID #10052571

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Grace Meng  
**Status:** Member  
**State/District:** NY06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 06/6/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
147-14 34th Avenue Realty ⇒ 41-33 Parsons Blvd #1A [RP] LOCATION: Flushing, NY, US		\$1,001 - \$15,000	None		<input type="checkbox"/>
147-14 34th Avenue Realty ⇒ 41-33 Parsons Blvd #1B [RP] LOCATION: Flushing, NY, US		\$1,001 - \$15,000	None		<input type="checkbox"/>
ACM Development LLC (5%) [RP] LOCATION: Flushing, NY, US DESCRIPTION: Property at: 34-40 Collins Place Flushing, NY 11355		\$15,001 - \$50,000	Rent	\$2,501 - \$5,000	<input type="checkbox"/>
Bank of America - Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
E*Trade - SEP IRA ⇒ Vanguard Total International Bond Index ETF (BNDX) [EF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Intel Corporation (INTC) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
John Hancock Life Insurance Limited Payment Whole Life [WU]		\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Johnson & Johnson (JNJ) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
L3Harris Technologies, Inc. (LHX) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
MetLife IRA-BlackRock Energy & Resources Portfolio [FN]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
NY 529 (DC1) ⇒ NY 529 Vanguard Plan (DC1) Aggressive Age-Based Portfolio: Moderate Growth (13-14 Years) [MF]	DC	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
NY 529 (DC1) ⇒ NY 529 Vanguard Plan (DC1) Growth Stock Index Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
NY 529 (DC2) ⇒ NY 529 Vanguard Plan (DC1) Aggressive Age-Based Portfolio: Moderate Growth [MF]	DC	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
NY 529 (DC2) ⇒ NY 529 Vanguard Plan (DC2) Growth Stock Index Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
NY Life Insurance Company - Whole Life [WU]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Procter & Gamble Company (PG) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Prudential IRA ⇒ Prudential Jennison Equity Income Class A Fund (SPQAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Prudential IRA ⇒ Prudential QMA International Equity Class A Fund (PJRAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Prudential Roth IRA ⇒ Invesco Van Kampen Value Opportunities Fund (VVOAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Prudential Roth IRA ⇒ Oppenheimer Global Fund (OPPAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Prudential Roth IRA ⇒ Pioneer High Yield Fund (TAHYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Prudential Roth IRA ⇒ Prudential Jennison Health Sciences Fund (PHLAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
SEP IRA ⇒ Vanguard Target Retirement 2045 Fund (VTIVX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
SPDR S&P Dividend ETF (SDY) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
TD Bank [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ American Century Emerging Markets Fund R6 Class (AEDMX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ CREF Social Choice R3 (QCSCIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ CREF Stock R3 (QCSTIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ TIAA Traditional [FN]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Developed Markets Index Fund Institutional Plus Shares (VDIPX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Emerging Markets Stock Index Fund Institutional Plus Shares (VEMRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Extended Market Index Fund Institutional Plus Shares (VEMPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard High-Yield Corporate Fund Investor Shares (VWEHX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Inflation-Protected Secs Fd (VAIPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIIIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Mid-Cap Value Index Fund (VMVAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Real Estate Index Institutional (VGSNX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Short Term Bond Index Fund Admiral Shares (VBIRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Small-Cap Growth Index Fund (VSGIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Small-Cap Value Index Fund Institutional Shares (VSIIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Value Index Fund Institutional Shares (VIVIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Wellesley Income Fund Admiral Shares (VWIAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ American Century Emerging Markets Fund R6 Class (AEDMX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ CREF Growth R3 (QCGRIX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ CREF Social Choice R3 (QCSCIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ CREF Stock R3 (QCSTIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA-CREF Retirement Annuity ⇒ TIAA Traditional [FN]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Developed Markets Index Fund Institutional Plus Shares (VDIPX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Emerging Markets Stock Index Fund Institutional Plus Shares (VEMRX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Equity-Income Fund Admiral Shares (VEIRX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Explorer Fund Admiral Shares (VEXRX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Extended Market Index Fund Institutional Plus Shares (VEMPX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard High-Yield Corporate Fund Investor Shares (VWEHX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Inflation-Protected Secs Fd (VAIPX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIIX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Mid-Cap Growth Index Fund Admiral Shares (VMGMX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Mid-Cap Value Index Fund (VMVAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Real Estate Index Institutional (VGSNX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Short Term Bond Index Fund Admiral Shares (VBIRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA-CREF Retirement Annuity ⇒ Vanguard Small-Cap Growth Index Fund (VSGIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Small-Cap Value Index Fund Institutional Shares (VSIIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Value Index Fund Institutional Shares (VIVIX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Wellesley Income Fund Admiral Shares (VWIAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Vanguard FTSEEuropean ETF (VGK) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Vanguard Large-Cap ETF - DNQ (VV) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Vanguard Small-Cap ETF - DNQ (VB) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Wealth Management LLC (10%) [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Flushing, NY, US DESCRIPTION: Property at: 132-15 35th Avenue Flushing, NY 11354					

\* 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?
NY 529 (DC1) ⇒ NY 529 Vanguard Plan (DC1) Aggressive Age-Based Portfolio: Moderate Growth (13-14 Years) [MF]	DC	06/6/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
NY 529 (DC1) ⇒ NY 529 Vanguard Plan (DC1) Growth Stock Index Portfolio [MF]	DC	06/6/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
NY 529 (DC2) ⇒ NY 529 Vanguard Plan (DC1) Aggressive Age-Based Portfolio: Moderate Growth [MF]	DC	10/6/2022	P	\$100,001 - \$250,000	
NY 529 (DC2) ⇒ NY 529 Vanguard Plan (DC2) Aggressive Growth Portfolio [MF]	DC	10/6/2022	S	\$100,001 - \$250,000	<input type="checkbox"/>
SEP IRA ⇒ Vanguard Target Retirement 2045 Fund (VTIVX) [MF]	SP	09/19/2022	P	\$15,001 - \$50,000	
SEP IRA ⇒ Vanguard Target Retirement 2045 Fund (VTIVX) [MF]	SP	12/28/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ American Century Emerging Markets Fund R6 Class (AEDMX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ CREF Social Choice R3 (QCSCIX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ CREF Stock R3 (QCSTIX) [MF]	SP	09/20/2022	P	\$15,001 - \$50,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ TIAA Traditional [FN]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Developed Markets Index Fund Institutional Plus Shares (VDIPX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Emerging Markets Stock Index Fund Institutional Plus Shares (VEMRX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Extended Market Index Fund Institutional Plus Shares (VEMPX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard High-Yield Corporate Fund Investor Shares (VWEHX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Inflation-Protected Secs Fd (VAIPX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIIIX) [MF]	SP	09/20/2022	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Institutional Target Retirement 2040 Fund (VIRSX) [MF]	SP	09/20/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Mid-Cap Value Index Fund (VMVAX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Real Estate Index Institutional (VGSNX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Short Term Bond Index Fund Admiral Shares (VBIRX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Small-Cap Growth Index Fund (VSGIX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Small-Cap Value Index Fund Institutional Shares (VSIIX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Total Bond Market Index Fund Institutional Plus Shares (VBMPX) [MF]	SP	09/20/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Value Index Fund Institutional Shares (VIVIX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Group Supplemental Retirement Annuity ⇒ Vanguard Wellesley Income Fund Admiral Shares (VWIAX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ American Century Emerging Markets Fund R6 Class (AEDMX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ CREF Global Equities R3 (QCGLIX) [MF]	SP	09/20/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TIAA-CREF Retirement Annuity ⇒ CREF Social Choice R3 (QCSCIX) [MF]	SP	09/20/2022	P	\$15,001 - \$50,000	
TIAA-CREF Retirement Annuity ⇒ CREF Social Choice R3 (QCSCIX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ CREF Stock R3 (QCSTIX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ CREF Stock R3 (QCSTIX) [MF]	SP	09/20/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ TIAA Real Estate (TIREX) [MF]	SP	09/20/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ TIAA Traditional [FN]	SP	09/20/2022	P	\$50,001 - \$100,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Developed Markets Index Fund Institutional Plus Shares (VDIPX) [MF]	SP	09/20/2022	P	\$50,001 - \$100,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Emerging Markets Stock Index Fund Institutional Plus Shares (VEMRX) [MF]	SP	09/20/2022	P	\$50,001 - \$100,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Equity-Income Fund Admiral Shares (VEIRX) [MF]	SP	09/20/2022	P	\$15,001 - \$50,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Explorer Fund Admiral Shares (VEXRX) [MF]	SP	09/20/2022	P	\$15,001 - \$50,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Extended Market Index Fund Institutional Plus Shares (VEMPX) [MF]	SP	09/20/2022	P	\$15,001 - \$50,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Global Equity Fund Investor Shares (VHGEX) [MF]	SP	09/20/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard High-Yield Corporate Fund Investor Shares (VWEHX) [MF]	SP	09/20/2022	P	\$15,001 - \$50,000	
TIAA-CREF Retirement Annuity ⇒	SP	09/20/2022	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Inflation-Protected Secs Fd (VAIPX) [MF]					
TIAA-CREF Retirement Annuity ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VHIX) [MF]	SP	02/1/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VHIX) [MF]	SP	03/1/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VHIX) [MF]	SP	04/1/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VHIX) [MF]	SP	04/29/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VHIX) [MF]	SP	06/1/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VHIX) [MF]	SP	07/1/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VHIX) [MF]	SP	09/20/2022	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Institutional Target Retirement 2040 Fund (VIRSX) [MF]	SP	09/20/2022	S	\$100,001 - \$250,000	<input type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Mid-Cap Growth Index Fund Admiral Shares (VMGMX) [MF]	SP	09/20/2022	P	\$15,001 - \$50,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Mid-Cap Value Index Fund (VMVAX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Real Estate Index Institutional (VGSNX) [MF]	SP	09/20/2022	P	\$15,001 - \$50,000	
TIAA-CREF Retirement Annuity ⇒	SP	09/20/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Short Term Bond Index Fund Admiral Shares (VBIRX) [MF]					
TIAA-CREF Retirement Annuity ⇒ Vanguard Small-Cap Growth Index Fund (VSGIX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Small-Cap Value Index Fund Institutional Shares (VSIIX) [MF]	SP	09/20/2022	P	\$15,001 - \$50,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Total Bond Market Index Fund Institutional Plus Shares (VBMPX) [MF]	SP	09/20/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
TIAA-CREF Retirement Annuity ⇒ Vanguard Value Index Fund Institutional Shares (VIVIX) [MF]	SP	09/20/2022	P	\$15,001 - \$50,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Value Index Fund Institutional Shares (VIVIX) [MF]	SP	09/20/2022	P	\$1,001 - \$15,000	
TIAA-CREF Retirement Annuity ⇒ Vanguard Wellesley Income Fund Admiral Shares (VWIAX) [MF]	SP	09/20/2022	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
New York University	Spouse Salary	N/A
Wayne Kye, DDS	Spouse Salary	N/A
American Board of Periodontology	Spouse Honorarium	\$1,800.00
Commission on Dental Competency Assessments	Spouse Honorarium	\$250.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of America, N.A.	May 2014	Home equity line of credit (HELOC)	\$250,001 - \$500,000
JT	Bank of America, N.A.	October 2006	Mortgage on primary residence	\$50,001 - \$100,000
SP	Navient	November 2004	Student loan	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Directors	University of Michigan Alumni Association
Secretary, Treasurer	Greater Purpose Foundation

SCHEDULE F: AGREEMENTS

None disclosed.

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 ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>147-14 34th Avenue Realty (3% Interest) LOCATION: Flushing, NY, US</li><li>E*Trade - SEP IRA (Owner: SP)</li><li>NY 529 (DC1) (Owner: DC) LOCATION: NY</li><li>NY 529 (DC2) (Owner: DC) LOCATION: NY</li><li>Prudential IRA</li><li>Prudential Roth IRA</li><li>SEP IRA (Owner: SP)</li><li>TIAA-CREF Group Supplemental Retirement Annuity (Owner: SP)</li></ul>
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- TIAA-CREF Retirement Annuity (Owner: SP)  
COMMENTS: Previously referred to as "TIAA-CREF Retirement Annuity - TIAA Real Estate"

## 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. Grace Meng , 06/6/2023