



# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Marilyn Strickland  
**Status:** Member  
**State/District:** WA10

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 08/11/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Banner Bank Account [BA]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
Cetera Brokerage Account ⇒ American Investment Company of America Fund Class A (AIVSX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒ Bridge Builder Core Plus Bond (BBCPX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Bridge Builder INTL Equity (BBIEX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒ Bridge Builder Large Growth (BBGLX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒ Bridge Builder Large Value (BBVLX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒ Bridge Builder Small/Mid Grw (BBGSX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒		\$1,001 - \$15,000	Capital Gains,	\$201 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bridge Builder Small/Mid Value (BBVSX) [MF]			Dividends	\$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Dfa INTL Small Company I (DFISX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Federated Instl HI-Yld BD R6 (FIHLX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Goldman Fs Government I (FGTXX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ iShares Core US Aggregate Bond (AGG) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ iShares MSCI EAFE Small Cap Et (SCZ) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ JPM Emerging Markets Equity A (JFAMX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Oakmark International R6 (OAZIX) [MF]		None	None		<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒ SPDR DJ Global Real Estate ETF (RWO) [EF]		None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒ Vanguard FTSE Dev Mkts ETF (VEA) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒ Vanguard FTSE Emerging Mkt ETF (VWO) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Vanguard Growth ETF (VUG) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒ Vanguard Large Cap ETF (VV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Vanguard Small Cap ETF (VB) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones IRA ⇒ Bridge Builder Core Plus Bond (BBCPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder INTL Equity (BBIEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Large Growth (BBGLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Large Value (BBVLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Small/Mid Grw (BBGSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Small/Mid Value (BBVSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Dfa INTL Small Company I (DFISX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Federated Instl HI-Yld BD R6 (FIHLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Goldman Fs Government I (FGTXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ iShares Core US Aggregate Bond (AGG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ iShares MSCI EAFE Small Cap Et (SCZ) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ JPM Emerging Markets Equity A (JFAMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Oakmark International R6 (OAZIX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ SPDR Dj Global Real Estate ETF (RWO) [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Vanguard FTSE Dev Mkts ETF (VEA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones IRA ⇒ Vanguard FTSE Emerging Mkt ETF (VWO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Growth ETF (VUG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Large Cap ETF (VV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Small Cap ETF (VB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
GESA Credit Union [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Key Bank accounts [BA]		\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>
Lincoln Financial Group Variable Annuity ⇒ 6 Year Capital Strength Cap 20% Protect [OT] DESCRIPTION: Variable Annuity		\$15,001 - \$50,000	None		<input type="checkbox"/>
Lincoln Financial Group Variable Annuity ⇒ 6 Year S&P 500 Cap 20% Protection [OT] DESCRIPTION: Variable Annuity		\$15,001 - \$50,000	None		<input type="checkbox"/>
New York Life Adjustable Life Insurance [WU]		\$15,001 - \$50,000	None		<input type="checkbox"/>
New York Life Whole Life Insurance [WU]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Seattle Metropolitan Chamber of Commerce 401(k) Plan ⇒ AF Trgt Date 2025 R6 (RFDTX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Standard Life Insurance [WU]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Tacoma Employees Retirement System Defined Benefit Plan [DB]		\$100,001 - \$250,000	None		<input type="checkbox"/>
TIAA State Board Retirement Plan ⇒		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
T-C Lifecycle 2025-Inst (TCLFX) [MF]					<input type="checkbox"/>
Washington State Teachers Retirement System Defined Benefit Plan [DB]	SP	\$500,001 - \$1,000,000	None		<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?
Cetera Brokerage Account ⇒ American Investment Company of America Fund Class A (AIVSX) [MF]		08/5/2022	P	\$50,001 - \$100,000	<input type="checkbox"/>
Cetera Brokerage Account ⇒ American Investment Company of America Fund Class A (AIVSX) [MF]		12/15/2022	P	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Bridge Builder INTL Equity (BBIEX) [MF]		03/30/2022	P	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Bridge Builder INTL Equity (BBIEX) [MF]		11/10/2022	P	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Bridge Builder Large Growth (BBGLX) [MF]		11/10/2022	P	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Bridge Builder Large Value (BBVLX) [MF]		11/10/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒ Bridge Builder Small/Mid Grw (BBGSX) [MF]		03/30/2022	P	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Bridge Builder Small/Mid Value (BBVSX) [MF]		03/30/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account ⇒ Oakmark International R6 (OAZIX) [MF]		11/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Oakmark International R6 (OAZIX) [MF]		11/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Edward Jones Brokerage Account ⇒ SPDR DJ Global Real Estate ETF (RWO) [EF]		03/30/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Vanguard FTSE Dev Mkts ETF (VEA) [EF]		11/10/2022	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account ⇒ Vanguard Growth ETF (VUG) [EF]		03/30/2022	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account ⇒ Vanguard Small Cap ETF (VB) [EF]		03/30/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Vanguard Value ETF (VTV) [EF]		11/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder INTL Equity (BBIEX) [MF]		03/28/2022	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ Bridge Builder INTL Equity (BBIEX) [MF]		11/10/2022	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ Bridge Builder Large Value (BBVLX) [MF]		11/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Bridge Builder Small/Mid Grw (BBGSX) [MF]		03/28/2022	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ Oakmark International R6 (OAZIX) [EF]		11/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Oakmark International R6 (OAZIX) [EF]		11/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ SPDR DJ Global Real Estate ETF (RWO) [EF]		03/28/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard FTSE Dev Mkts ETF (VEA) [EF]		11/10/2022	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒ Vanguard Growth ETF (VUG) [EF]		03/28/2022	P	\$1,001 - \$15,000	
Edward Jones IRA ⇒		03/28/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Small Cap ETF (VB) [EF]			(partial)		<input type="checkbox"/>
Edward Jones IRA ⇒ Vanguard Value ETF (VTV) [EF]		11/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Lincoln Financial Group Variable Annuity ⇒ 6 Year Capital Strength Cap 20% Protection [VA] DESCRIPTION: Purchase of Variable Annuity		08/8/2022	P	\$15,001 - \$50,000	
Lincoln Financial Group Variable Annuity ⇒ 6 Year S&P 500 Cap 20% Protection [VA] DESCRIPTION: Purchase of Variable Annuity		08/8/2022	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
Tacoma Public Schools	Spouse salary	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Movement Mortgage	June 2020	Mortgage on primary residence	\$250,001 - \$500,000

### SCHEDULE E: POSITIONS

None disclosed.

### 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

- Cetera Brokerage Account  
LOCATION: US
- Edward Jones Brokerage Account  
LOCATION: US
- Edward Jones IRA
- Lincoln Financial Group Variable Annuity
- Seattle Metropolitan Chamber of Commerce 401(k) Plan
- TIAA State Board Retirement Plan

## 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. Marilyn Strickland , 08/11/2023