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## Annual Report for Calendar 2022

The Honorable Patty Murray (Murray, Patty)

 Filed 04/25/2023 @ 8:33 AM

 Print Report

The following statements were checked before filing:

- ☒ I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- ☒ I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.

☐ I *omitted* assets because they meet the three-part test for exemption.

### Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance?

**No**

### Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Spouse	Retirement	Fidelity Investments Boston, MA	> \$1,000	n/a
2	Spouse	Retirement	Vanguard Group Malvern, PA	> \$1,000	n/a
3	Spouse	Retirement	J P Morgan Chase New York City, NY	> \$1,000	n/a
4	Self	Retirement	J P Morgan Chase New York City, NY	\$4,940.69	n/a

### Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

	Asset	Asset Type	Owner	Value	Income Type	Income
1	<b>USSFCU</b> (Washington, DC) <i>Type: Checking,</i>	Bank Deposit	Joint	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
2	<b>USSFCU</b> (Washington, DC) <i>Type: Savings,</i>	Bank Deposit	Joint	\$50,001 - \$100,000	Dividends,	None (or less than \$201)

3	<b>USSFCU</b> (Washington, DC) <i>Asset Type:</i> Certificate of Deposit,	Bank Deposit Asset Type	Joint  Owner	\$100,001 - \$250,000 Value	Dividends, Income Type	\$2,501 - Income \$5,000
4	<b>USSFCU</b> (Washington, DC) <i>Type:</i> Money Market Account,	Bank Deposit	Joint	\$50,001 - \$100,000	Dividends,	None (or less than \$201)
5	<b>USSFCU</b> (Washington, DC) <i>Type:</i> Checking,	Bank Deposit	Joint	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
6	<b>Whidbey Island Bank</b> (Freeland, WA) <i>Type:</i> Checking,	Bank Deposit	Joint	\$15,001 - \$50,000	Interest,	None (or less than \$201)
7	<b>Whidbey Island Bank</b> (Freeland, WA) <i>Type:</i> Savings,	Bank Deposit	Joint	\$50,001 - \$100,000	Interest,	None (or less than \$201)
8	<b>Fidelity</b> (Seattle, WA) <i>Type:</i> Checking,	Bank Deposit	Joint	\$50,001 - \$100,000	Interest,	\$201 - \$1,000
9	<b>Spouse IRA</b>	Retirement Plans IRA	Spouse			
9.1	<b><a href="#">PQIAX</a> - Principal Equity Income A (NASDAQ)</b>	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
10	<b>Self IRA</b>	Retirement Plans IRA	Self			
10.1	<b><a href="#">PQIAX</a> - Principal Equity Income A (NASDAQ)</b>	Mutual Funds Mutual	Self	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than

		Fund			Income	\$201)
11	Asset Spouse IRA	Asset Type Retirement Plans IRA	Owner Spouse	Value	Type	Income
11.1	<a href="#">VPMCX</a> - Vanguard PRIMECAP Inv (NASDAQ)	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
11.2	<a href="#">VGENX</a> - Vanguard Energy Inv (NASDAQ)	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
11.3	<a href="#">VWUSX</a> - Vanguard U.S. Growth Fund Investor Shares	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12	Variable Annuity <i>Provider: Fidelity</i>	Annuity Variable Annuity	Spouse			
12.1	FAVAM	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
13	Spouse IRA	Retirement Plans IRA	Spouse			
13.1	<a href="#">FFTHX</a> - Fidelity Freedom 2035	Mutual Funds Mutual Fund	Spouse	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
13.2	<a href="#">FFXSX</a> - Fidelity Limited Term Government	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)

13.3	<a href="#">FXAIX</a> - Fidelity 500 Index Fund	Mutual Funds Asset Type Mutual Fund	Spouse Owner	\$1,001 - \$15,000 Value	Excepted Investment Fund, Income	None (or less than \$201)
13.4	<b>FDRXX-Fidelity Cash Reserves</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
13.5	<a href="#">FFFEX</a> - Fidelity Freedom 2030	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
13.6	<a href="#">FMAGX</a> - Fidelity Magellan	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
13.7	<a href="#">FBALX</a> - Fidelity Balanced	Mutual Funds Mutual Fund	Spouse	\$500,001 - \$1,000,000	Excepted Investment Fund,	None (or less than \$201)
13.8	<a href="#">FGRIX</a> - Fidelity Growth & Income	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
13.9	<a href="#">FFFFX</a> - Fidelity Freedom 2040 Fund	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
14	<b>Western &amp; Southern Life Assurance Co. Individual Retirement Annuity</b> <i>Provider: Western &amp; Southern</i>	Annuity Fixed	Spouse	\$100,001 - \$250,000	Interest,	None (or less than \$201)
15	<b>State of Washington Retirement Plan PERS1</b>	Retirement Plans Defined	Self	\$15,001 - \$50,000	Interest,	None (or less than

Asset	Benefit Pension Plan	Owner	Value	Income Type	Income
					\$201)
					Income

Part 4a. Periodic Transaction Report Summary

In this section, electronically filed periodic transaction report (PTR) transactions are displayed for you.

Part 4b. Transactions

Did you, your spouse, or dependent child buy, sell, or exchange an asset where the transaction exceeded \$1,000 and was not reported on Part 4a? **Yes**

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
1	Spouse	<a href="#">PQIAX</a>	Principal Fds Inc. Equity Income Fd Cl A	Sale (Partial)	11/23/2022	\$1,001 - \$15,000	n/a
2	Self	<a href="#">PQIAX</a>	Principal Fds Inc. Equity Income Fd Cl A	Sale (Partial)	11/23/2022	\$1,001 - \$15,000	n/a
3	Spouse	<a href="#">PQIAX</a>	Principal Fds Inc. Equity Income Fd Cl A	Sale (Partial)	12/02/2022	\$1,001 - \$15,000	n/a
4	Self	<a href="#">PQIAX</a>	Principal Fds Inc. Equity Income Fd Cl A	Sale (Partial)	12/02/2022	\$1,001 - \$15,000	n/a
5	Spouse	<a href="#">FFEX</a>	Fidelity Freedom 2030 Fund	Sale (Partial)	12/02/2022	\$50,001 - \$100,000	n/a
6	Spouse	<a href="#">VPMCX</a>	Vanguard Primecap Fund	Sale (Partial)	12/05/2022	\$1,001 - \$15,000	n/a

## Part 5. Gifts

Did you, your spouse, or dependent child receive any reportable gift during the reporting period? **No**

## Part 6. Travel

Did you, your spouse, or dependent child receive any reportable travel? **No**

## Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2018	Joint	Mortgage	1	4.75% (30 Years)	\$100,001 - \$250,000	USSFCU Washington, DC	n/a

## Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **No**

## Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **Yes**



#	Date	Parties Involved	Type	Status and Terms	Comments
1	Jan 1989	State of Washington Olympia, WA	Continuing participation in an employee benefit plan	This is a pension plan administered by Washington State (PERS1) that I continue to participate in	n/a

## Part 10. Compensation

*Only required if you are a candidate or this is your first report* Did any person or entity pay more than \$5,000 to you or for services provided by you? **This is not my first report.**

## Attachments & Comments

*No attachments added.*

*No comments added.*