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Annual Report for Calendar 2024

The Honorable Adam B Schiff (Schiff, Adam B.)

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Print Report

The following statements were checked before filing:

- [x] I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- [x] 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? **Yes**

#	Date	Activity	Amount	Who Paid?	Who received payment?	Comments
1	01/27/2024	Appearance	$850.00	Bill Maher Productions, Inc. Los Angeles, CA	A Charity	n/a

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	Other (Inherited IRA distribution)	UBS Financial Services Inc. Weehawken, NJ	> $1,000	Inherited IRA was previously held with T. Rowe Price
2	Spouse	Wages	Naborforce Richmond, VA	> $1,000	n/a
3	Self	Royalties	Penguin Random House New York, NY	$8,339.75	n/a
4	Spouse	Other (Marketplace income)	eBay Commerce Inc. San Jose, CA	> $1,000	n/a
5	Self	Other (Inherited Fixed Income Annuity)	Allianz Life Insurance Company of North America Minneapolis, MN	$8,653.68	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	**UBS - Inherited IRA**	Retirement Plans IRA	Spouse			
1.1	**SMH - VanEck Semiconductor ETF**	Mutual Funds Exchange Traded Fund/Note	Spouse	$15,001 - $50,000	Excepted Investment Fund,	None (or less than $201)
2	**UBS Brokerage Account**	Brokerage/Managed Account	Spouse			
2.1	**AAPL - Apple Inc**	Corporate Securities Stock	Spouse	$100,001 - $250,000	Dividends,	$201 - $1,000
2.2	**IVV - iShares Core S&P 500 ETF** *Filer comment:* Inadvertently reported $100,001-$250,000 value range in 2023	Mutual Funds Exchange Traded Fund/Note	Spouse	$50,001 - $100,000	Excepted Investment Fund,	$1,001 - $2,500
2.3	**QQQ - Invesco QQQ Trust, Series 1** *Filer comment:* Inadvertently reported $50,001-$100,000 value range in 2023	Mutual Funds Exchange Traded Fund/Note	Spouse	$100,001 - $250,000	Excepted Investment Fund,	$201 - $1,000

		Asset Type	Owner	Value	Income Type	Income
3	**UBS - IRA** Asset	Retirement Plans IRA	Spouse			
3.1	**FPURX - Fidelity Puritan Fund**	Mutual Funds Mutual Fund	Spouse	$250,001 - $500,000	Excepted Investment Fund,	None (or less than $201)
4	**UBS - IRA**	Retirement Plans IRA	Self			
4.1	**IVV - iShares Core S&P 500 ETF**	Mutual Funds Exchange Traded Fund/Note	Self	$100,001 - $250,000	Excepted Investment Fund,	None (or less than $201)
4.2	**QQQ - Invesco QQQ Trust, Series 1**	Mutual Funds Exchange Traded Fund/Note	Self	$250,001 - $500,000	Excepted Investment Fund,	None (or less than $201)
4.3	**UBS Financial Services, Inc.** (San Diego, CA) *Type:* IRA Cash Accounts,	Bank Deposit	Self	$1,001 - $15,000	None,	None (or less than $201)
5	**Franklin Templeton – Brokerage Account**	Brokerage/Managed Account	Joint			
5.1	**FGRAX - Franklin Growth Opportunities Fund Class A**	Mutual Funds Mutual Fund	Joint	$100,001 - $250,000	Excepted Investment Fund,	$15,001 - $50,000
5.2	**TEDIX - Mutual Global Discovery Fund Class A**	Mutual Funds Mutual Fund	Joint	$50,001 - $100,000	Excepted Investment Fund,	$5,001 - $15,000
5.3	**FRDPX - Franklin Managed Trust Rising Dividends Fund Cl**	Mutual Funds Mutual Fund	Joint	$100,001 - $250,000	Excepted Investment Fund,	$5,001 - $15,000
5.4	**TESIX - Franklin Mutual Shares Fund Class A**	Mutual Funds Mutual Fund	Joint	$50,001 - $100,000	Excepted Investment Fund,	$5,001 - $15,000
6	**Allianze Life Insurance – Inherited Fixed Annuity** *Provider:* Allianze Life Insurance Company Of North America *Filer comment:* Inherited Annuity in 2024	Annuity Fixed	Self	$15,001 - $50,000	None,	None (or less than $201)
7	**Bank of America – Bank Deposit** (Tampa, FL) *Type:* Checking,	Bank Deposit	Joint	$1,001 - $15,000	None,	None (or less than $201)

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	FPURX	Fidelity Puritan Fund	Purchase	12/23/2024	$1,001 - $15,000	n/a
2	Self	IVV	iShares Core S&P 500 ETF	Purchase	12/03/2024	$1,001 - $15,000	n/a
3	Self	WPC	W. P. Carey Inc. REIT	Sale (Full)	12/03/2024	$1,001 - $15,000	n/a
4	Spouse	SMH	VanEck Semiconductor ETF	Purchase	10/31/2024	$15,001 - $50,000	n/a
5	Spouse	PRNHX	T. Rowe Price New Horizons Fund	Sale (Full)	10/31/2024	$15,001 - $50,000	n/a
6	Spouse	FPURX	Fidelity Puritan Fund	Purchase	10/14/2024	$15,001 - $50,000	n/a
7	Spouse	FPURX	Fidelity Puritan Fund	Purchase	07/08/2024	$1,001 - $15,000	n/a
8	Spouse	FPURX	Fidelity Puritan Fund	Purchase	04/08/2024	$1,001 - $15,000	n/a
9	Joint	FRDPX	Franklin Managed Trust Rising Dividends Fund Cl	Purchase	12/20/2024	$1,001 - $15,000	n/a
10	Joint	TESIX	Franklin Mutual Shares Fund Class A	Purchase	12/20/2024	$1,001 - $15,000	n/a
11	Joint	TEDIX	Mutual Global Discovery Fund Class A	Purchase	12/20/2024	$1,001 - $15,000	n/a
12	Joint	FGRAX	Franklin Growth Opportunities Fund Class A	Purchase	12/20/2024	$15,001 - $50,000	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	2020	Joint	Mortgage	0.00	3.0% (22 years)	$250,001 - $500,000	Valon Mortgage, Inc. Phoenix, AZ	Mr. Cooper loan trans. to Valon Mortgage in 2024; original loan incurred 2017; refinanced in 2020
2	2020	Joint	Mortgage	0.00	3.0% (30 years)	$100,001 - $250,000	PHH Mortgage Corporation West Palm Beach, FL	Snapfi loan transferred to PHH Mortgage in 2024
3	2024	Spouse	Other (Margin Loan)	-	7.706% (on demand)	$50,001 - $100,000	UBS Financial Services Inc. San Diego, CA	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	Aug 2020	Penguin Random House New York, NY	Royalty Agreement	Agreement to receive royalty payments based on customary and usual terms for publication of the book titled, "Midnight in Washington."	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.