



Filing ID #10066343

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Judy Chu
Status: Member
State/District: CA28

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 05/14/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Apollo Medical Holdings, Inc. (AMEH) [ST]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
DESCRIPTION: Fund is owned solely by spouse.					
California Public Employees Retirement System [DB]		Undetermined	defined benefit	\$15,001 - \$50,000	<input type="checkbox"/>
California State Teachers Retirement System [DB]		Undetermined	defined benefit	\$15,001 - \$50,000	<input type="checkbox"/>
Citibank Savings Acct [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Citibank- J.M. Chu Irrevocable Trust II [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Community Commerce Bank Certificate of Deposit [BA]	SP	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
East West Bank Certificate of Deposit [BA]	SP	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Charitable Account- Judy Chu Fund [BA]		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
New Omni Bank Certificate of Deposit [BA]	SP	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
New Omni Bank Savings Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Preferred Bank Certificate of Deposit [BA]	SP	\$500,001 - \$1,000,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Rental Property #1, 32.8% [RP] LOCATION: Santa Clara, CA, US		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Rental Property #2, 32.8% [RP] LOCATION: Santa Clara, CA, US		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Rental Property #3, 32.8% [RP] LOCATION: Santa Clara, CA, US DESCRIPTION: .		\$500,001 - \$1,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
Rental Property #4, 32.8% [RP] LOCATION: Santa Clara, CA, US		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
United Pacific Bank Certificate of Deposit [BA]	SP	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Wells Fargo Bank Checking Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Bank Savings Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Chu-Lim Investments LLC ⇒ Chu Lim Investments LLC 32.8% [BA]		\$100,001 - \$250,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Savings Plus ⇒ 401K International Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Large Cap Fund [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
401K Large Cap Index Fund [PE]					<input type="checkbox"/>
Savings Plus ⇒ 401K Large Cap Socially Responsible Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Mid Cap Fund [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Short Term Investment Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Short Term Investment Fund- Cash [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 401K Small Cap Fund [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 International Fund [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Large Cap Socially Responsible Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Large Cap Fund [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Large Cap Index Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Mid Cap Fund [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Short Term Investment Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Short Term Investment Fund- Cash [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Savings Plus ⇒ 457 Small Cap Fund [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard California Intermediate-Term Tax-Exempt Fd Admiral Sh (VCADX) [MF]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard- Eng Chu Family Trust ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Extended Market ETF (VXF) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Funds were converted from the Vanguard Extended Market Index Admiral CL (VEXAX.)					
Vanguard- Eng Chu Family Trust ⇒ Vanguard Extended Market Index Fd Admiral Shs (VEXAX) [MF]		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: This fund was converted to the Vanguard Extended Market ETF (VXF).					
Vanguard- Eng Chu Family Trust ⇒ Vanguard Federal Money Market Account [BA]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Conversion of funds from Vanguard FTSE All World ex-IS Adm (VFWAX.)					
Vanguard- Eng Chu Family Trust ⇒ Vanguard FTSE All-World ex-US Index Fd Admiral (VFWAX) [MF]		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: This fund was converted to the Vanguard FTSE All World ex-US ETF (VEU.)					
Vanguard- Eng Chu Family Trust ⇒ Vanguard Growth ETF (VUG) [EF]		\$500,001 - \$1,000,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Funds were converted from Vanguard Growth Index Admiral CI (VIGAX.)					
Vanguard- Eng Chu Family Trust ⇒ Vanguard Growth Index Fd Admiral Shs (VIGAX) [MF]		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Fund was converted to Vanguard Growth ETF (VUG.)					
Vanguard- Eng Chu Family Trust ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Long-Term Tax-Exempt Fd Admiral Shs (VWLUX) [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Mid-Cap ETF (VO) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Fund was converted from Vanguard Mid-Cap Index Admiral Cl (VIMAX.)					
Vanguard- Eng Chu Family Trust ⇒ Vanguard Mid-Cap Index Fund Admiral Shares (VIMAX) [MF]		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: This fund was converted to the Vanguard Mid-Cap ETF (VO.)					
Vanguard- Eng Chu Family Trust ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Funds converted from Vanguard Total Stock Market Index Admiral Cl (VTSAX.)					
Vanguard- Eng Chu Family Trust ⇒ Vanguard Total Stock Market Index Fd Admiral Shs (VTSAX) [MF]		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: This fund was converted to the Vanguard Total Stock Market ETF (VTI.)					
Vanguard- Eng Chu Family Trust ⇒ Vanguard Value ETF (VTV) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Windsor II Fund Admiral Shares (VWNAX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard IRA ⇒ Vanguard Total Bond Market Index Fund Admiral (VBTLX) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard IRA ⇒ Vanguard Total International Bond Index (VTABX) [PE]		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Conversion of funds to Vanguard Total International Bond Index ETF (BNDX)					
Vanguard IRA ⇒ Vanguard Total International Bond Index ETF (BNDX) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Conversion of funds from Vanguard Total International Bond Index Admiral Class (VTABX)					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Conversion of funds from Vanguard Dividend Appreciation Index Fund (VDADX.)					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Dividend Appreciation Index Fund Admiral Shs (VDADX) [MF]		None	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Some funds sold and some converted to Vanguard Dividend Appreciation ETF (VIG.)					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Extended Market ETF (VXF) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Some funds sold; some funds converted from Vanguard Extended Market Index Admiral Class (VEXAX)					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Extended Market Index Fd Admiral Shs (VEXAX) [MF]		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Fund converted to Vanguard Extended Market ETF (VXF.)					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Federal Money Market Account [BA]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard FTSE All-World ex-US Index Fd Admiral (VFWAX) [MF]		None	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Some funds sold. Some funds converted to Vanguard FTSE All World Ex US ETF (VEU.)					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Long-Term Tax-Exempt Fd Admiral Shs (VWLUX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard LTD Term tax-exempt Admiral Cl (VMLUX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed ⇒ Vanguard Value ETF (VTV) [EF]		None	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

* Investment Vehicle 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?
Apollo Medical Holdings, Inc. (AMEH) [ST] DESCRIPTION: Fund is owned solely by spouse.	SP	01/10/2024	P	\$100,001 - \$250,000	
Apollo Medical Holdings, Inc. (AMEH) [ST] DESCRIPTION: Fund is owned solely by spouse.	SP	01/10/2024	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Long-Term Tax-Exempt Fd Admiral Shs (VWLUX) [MF]		01/31/2024	P	\$100,001 - \$250,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]		01/31/2024	P	\$1,001 - \$15,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard Extended Market Index Fd Admiral Shs (VEXAX) [MF]		01/31/2024	P	\$15,001 - \$50,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard Value ETF (VTV) [EF]		01/31/2024	P	\$15,001 - \$50,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		01/31/2024	P	\$1,001 - \$15,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]		01/31/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard- Eng Chu Family Trust ⇒ Vanguard Long-Term Tax-Exempt Fd Admiral Shs (VWLUX) [MF]		02/12/2024	P	\$1,001 - \$15,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]		02/12/2024	P	\$1,001 - \$15,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		02/12/2024	P	\$1,001 - \$15,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]		02/12/2024	P	\$1,001 - \$15,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard Mid-Cap Index Fund Admiral Shares (VIMAX) [MF] DESCRIPTION: Conversion of funds to Vanguard Midcap ETF (VO)		02/12/2024	S	\$50,001 - \$100,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Mid-Cap ETF (VO) [EF] DESCRIPTION: Conversion of funds from Vanguard Mid Cap Index Admiral (VIMAX)		02/12/2024	P	\$50,001 - \$100,000	
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		01/25/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		01/25/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard Value ETF (VTV) [EF]		01/25/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard Extended Market ETF (VXF) [EF]		01/25/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard Dividend Appreciation Index Fund Admiral Shs (VDADX) [MF]		01/25/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard FTSE All-World ex-US Index Fd Admiral (VFWAX) [MF]		01/25/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒		02/12/2024	S	\$250,001 -	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Growth Index Fd Admiral Shs (VIGAX) [MF] DESCRIPTION: Conversion of funds to Vanguard Growth ETF (VUG)				\$500,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Growth ETF (VUG) [EF] DESCRIPTION: Conversion of funds from Vanguard Growth Index Admiral (VIGAX)		02/12/2024	P	\$250,001 - \$500,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard FTSE All-World ex-US Index Fd Admiral (VFWAX) [MF] DESCRIPTION: Conversion of Funds to Vanguard FTSE All-World ex-US ETF (VEU)		02/12/2024	S	\$250,001 - \$500,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF] DESCRIPTION: Conversion of funds from Vanguard FTSE All World ex US Index Admiral (VGWAX)		02/12/2024	P	\$250,001 - \$500,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard Extended Market Index Fd Admiral Shs (VEXAX) [MF] DESCRIPTION: Conversion of funds to Vanguard Extended Market ETF (VXF)		02/12/2024	S	\$100,001 - \$250,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Extended Market ETF (VXF) [EF] DESCRIPTION: Conversion of funds from Vanguard Extended Market Index Admiral (VEXAX)		02/12/2024	P	\$100,001 - \$250,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard Total Stock Market Index Fd Admiral Shs (VTSAX) [MF] DESCRIPTION: Conversion of funds to Vanguard Total Stock Market ETF (VTSAX)		02/12/2024	S	\$250,001 - \$500,000	<input type="checkbox"/>
Vanguard- Eng Chu Family Trust ⇒ Vanguard Total Stock Market ETF (VTI) [EF] DESCRIPTION: Conversion of funds from Vanguard Total Stock Market Index Admiral (VTSAX)		02/12/2024	P	\$250,001 - \$500,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]		10/25/2024	P	\$15,001 - \$50,000	
Vanguard- Eng Chu Family Trust ⇒ Vanguard Long-Term Tax-Exempt Fd Admiral Shs (VWLUX) [MF]		10/25/2024	P	\$50,001 - \$100,000	
Vanguard IRA ⇒ Vanguard Total International Bond Index Admiral (VTABX) [IR]		02/12/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Conversion of funds to Vanguard Total International Bond Index ETF (BNDX)					
Vanguard IRA ⇒ Vanguard Total International Bond Index ETF (BNDX) [IR]		02/12/2024	P	\$15,001 - \$50,000	
DESCRIPTION: Conversion of funds from Vanguard Total International Bond Index Admiral (VTABX)					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]		01/25/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard Dividend Appreciation Index Fund Admiral Shs (VDADX) [MF]		02/12/2024	S	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: conversion of funds to Vanguard Dividend Appreciation Index Fund ETF (VIG)					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		02/12/2024	P	\$50,001 - \$100,000	
DESCRIPTION: Conversion of funds from Vanguard Dividend Appreciation Index Admiral (VDADX)					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard FTSE All-World ex-US Index Fd Admiral (VFWAX) [MF]		02/12/2024	S	\$100,001 - \$250,000	<input type="checkbox"/>
DESCRIPTION: Conversion of Funds to Vanguard FTSE All World Ex-US ETF (VEU)					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]		02/12/2024	P	\$100,001 - \$250,000	
DESCRIPTION: Conversion of Funds from Vanguard FTSE All World Ex-US Index Admiral (VFWAX)					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard Extended Market Index Fd Admiral Shs (VEXAX) [MF]		02/12/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Conversion of funds to Vanguard Extended Market ETF (VXF)					
Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard Extended Market ETF (VXF) [EF]		02/12/2024	P	\$15,001 - \$50,000	
DESCRIPTION: Conversion of funds from Vanguard Extended Market Index Admiral (VEXAX)					

* Investment Vehicle 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
California Public Employees Retirement System	Defined Benefit	\$25,188.08

Source	Type	Amount
California State Teachers Retirement System	Defined Benefit	\$35,573.52
State of California	Spouse salary	N/A
San Gabriel Valley Municipal Water District	Spouse Board Attendance	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Capitol Hill Tower Housing Cooperative	May 2010	Mortgage on underlying property of personal residence, Washington DC (not rented)	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member (uncompensated)	Asian Pacific American Institute for Congressional Studies

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2001	Myself and California State Teachers Retirement System	Defined pension benefit plan for teaching position in the LA Community College District
May 2001	Myself and California Public Employees Retirement System	Defined pension benefit plan for service on Monterey Park City Council

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 INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">Savings PlusChu-Lim Investments LLC LOCATION: US

- Vanguard IRA
- Vanguard-JM Chu Irrevocable Trust II
- Vanguard- Eng Chu Family Trust
- Vanguard-JM Chu Irrevocable Trust II ⇒ Vanguard-JM Chu Irrevocable Trust II-managed
LOCATION: US

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. Judy Chu , 05/14/2025