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Financial Disclosure Report

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

Filer Information

Name: Hon. Kim Dr Schrier
Status: Member
State/District: WA08

Filing Information

Filing Type: Annual Report
Filing Year: 2024
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Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Commonspirit 401(k) with Franciscan Health ⇒ Fidelity Cash Reserves (FDRXX) [MF] Description: Fidelity Government Cash Reserves		$1,001 - $15,000	Tax-Deferred		☐
Commonspirit 401(k) with Franciscan Health ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		$1 - $1,000	Tax-Deferred		☐
Commonspirit 401(k) with Franciscan Health ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		$100,001 - $250,000	Tax-Deferred		☐
Commonspirit 401(k) with Franciscan Health ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]		$15,001 - $50,000	Tax-Deferred		☐
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		$100,001 - $250,000	Tax-Deferred		☑
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		$50,001 - $100,000	Tax-Deferred		☐
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		$1 - $1,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
David's IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
David's IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
David's IRA ⇒ Money Market [BA]	SP	None	Tax-Deferred		☐
David's IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	SP	$500,001 - $1,000,000	Tax-Deferred		☑
David's IRA ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☐
David's IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	SP	$100,001 - $250,000	Tax-Deferred		☐
David's IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Erisa 403b with Franciscan Health ⇒ Fidelity Cash Reserves (FDRXX) [MF] Description: Fidelity Cash Reserves		$1 - $1,000	Tax-Deferred		☐
Erisa 403b with Franciscan Health ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]		$100,001 - $250,000	Tax-Deferred		☐
Erisa 403b with Franciscan Health ⇒ Vanguard Developed Markets Index Admiral (VTMGX) [MF]		$100,001 - $250,000	Tax-Deferred		☑
Erisa 403b with Franciscan Health ⇒ Vanguard Intermediate-Term Investment Grade Fund Admiral Shrs (VFIDX) [MF]		$15,001 - $50,000	Tax-Deferred		☐
Erisa 403b with Franciscan Health ⇒ Vanguard Small-Cap Growth Index Fd Admiral (VSGAX) [MF]		$50,001 - $100,000	Tax-Deferred		☐
Inherited IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	JT	$50,001 - $100,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Inherited IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	JT	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ T.D Ameritrade - Cash [BA]	JT	None	Tax-Deferred		☐
Inherited IRA ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]	JT	$100,001 - $250,000	Tax-Deferred		☑
Inherited IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	JT	$100,001 - $250,000	Tax-Deferred		☑
Inherited IRA ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	JT	$1,001 - $15,000	Tax-Deferred		☐
Inherited IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	$15,001 - $50,000	Tax-Deferred		☑
Inherited IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	JT	$50,001 - $100,000	Tax-Deferred		☑
Kim's 403b - Pre-2009 ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		$100,001 - $250,000	Tax-Deferred		☐
Kim's 403b - Pre-2009 ⇒ Fidelity International Index Fund (FSPSX) [MF]		$100,001 - $250,000	Tax-Deferred		☐
Kim's 403b - Pre-2009 ⇒ Fidelity U.S. Bond Index Fund (FXNAX) [MF]		$50,001 - $100,000	Tax-Deferred		☐
Kim's Roth IRA - 2014 ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		$50,001 - $100,000	Tax-Deferred		☐
Kim's Roth IRA - 2014 ⇒ Money Market [BA]		$15,001 - $50,000	Tax-Deferred		☐
Kim's Roth IRA - 2014 ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		None	Tax-Deferred		☑
Samuel Gowing Trust ⇒ DFA International Social Core Equity Portfolio Instl Class (DSCLX) [MF]		$50,001 - $100,000	Dividends	$1,001 - $2,500	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Samuel Gowing Trust ⇒ FDIC Insured Deposit Account [BA]		$1,001 - $15,000	None		☐
Samuel Gowing Trust ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF] Description: Sold for a loss in 2024		None	None		☑
Samuel Gowing Trust ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		$15,001 - $50,000	Capital Gains, Dividends	$1,001 - $2,500	☑
Samuel Gowing Trust ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Samuel Gowing Trust ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST] Description: My son received this as a gift from his grandparents in 2024.		$15,001 - $50,000	None		☐
Samuel Gowing Trust ⇒ SPDR Portfolio Aggregate Bond ETF (SPAB) [EF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Samuel Gowing Trust ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		$15,001 - $50,000	Dividends	$201 - $1,000	☑
Samuel Gowing Trust ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		$50,001 - $100,000	Capital Gains, Dividends	$5,001 - $15,000	☑
Samuel Gowing Trust ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]		$1,001 - $15,000	Dividends	$1 - $200	☐
Samuel Gowing Trust ⇒ Vanguard Real Estate ETF (VNQ) [EF]		$15,001 - $50,000	Dividends	$201 - $1,000	☑
Samuel Gowing Trust ⇒ Vanguard Total Bond Market ETF (BND) [EF]		$15,001 - $50,000	Dividends	$201 - $1,000	☑
Schwab Brokerage ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST] Description: This was received as a gift from family in 2024, and has since been placed into the Gowing Schrier Qualified Blind Trust.	JT	$50,001 - $100,000	None		☐
Stanford Health Care Retirement Savings Plan ⇒ Fidelity Freedom Index 2030 Fund - Institutional Premium Class (FFEGX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
Trust ⇒	JT	$5,000,001 -	QBT Income	$50,001 -	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
The Gowing Schrier Qualified Blind Trust [EQ]		$25,000,000		$100,000	
Wells Fargo Bank ⇒ Wells Fargo - Checking [BA]	JT	$500,001 - $1,000,000	None		

* 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?
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		03/20/2024	P	$1,001 - $15,000	
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		06/25/2024	P	$1,001 - $15,000	
Erisa 403b with Franciscan Health ⇒ Vanguard Developed Markets Index Admiral (VTMGX) [MF]		06/24/2024	P	$1,001 - $15,000	
Erisa 403b with Franciscan Health ⇒ Vanguard Developed Markets Index Admiral (VTMGX) [MF]		12/24/2024	P	$1,001 - $15,000	
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		09/24/2024	P	$1,001 - $15,000	
Commonspirit 401(k) with Franciscan Health ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		12/24/2024	P	$1,001 - $15,000	
Inherited IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	JT	01/18/2024	P	$1,001 - $15,000	
Inherited IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	JT	04/02/2024	P	$15,001 - $50,000	
Inherited IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	JT	11/25/2024	P	$1,001 - $15,000	
Inherited IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	01/24/2024	P	$1,001 - $15,000	
Inherited IRA ⇒	JT	04/02/2024	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Vanguard Real Estate ETF (VNQ) [EF]					
Inherited IRA ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]	JT	07/19/2024	P	$1,001 - $15,000	
Inherited IRA ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]	JT	01/24/2024	P	$15,001 - $50,000	
Inherited IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	JT	01/24/2024	S (partial)	$15,001 - $50,000	☐
Samuel Gowing Trust ⇒ Vanguard Total Bond Market ETF (BND) [EF]		09/24/2024	S (partial)	$1,001 - $15,000	☐
Samuel Gowing Trust ⇒ Vanguard Total Bond Market ETF (BND) [EF]		06/28/2024	S (partial)	$1,001 - $15,000	☐
Samuel Gowing Trust ⇒ Vanguard Total Bond Market ETF (BND) [EF]		04/30/2024	S (partial)	$1,001 - $15,000	☐
Samuel Gowing Trust ⇒ Vanguard Total Bond Market ETF (BND) [EF]		04/17/2024	S (partial)	$1,001 - $15,000	☐
Samuel Gowing Trust ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		04/02/2024	S (partial)	$1,001 - $15,000	☑
Samuel Gowing Trust ⇒ Vanguard Total Bond Market ETF (BND) [EF]		04/02/2024	P	$1,001 - $15,000	
Samuel Gowing Trust ⇒ Vanguard Real Estate ETF (VNQ) [EF]		01/24/2024	P	$1,001 - $15,000	
Samuel Gowing Trust ⇒ Vanguard Total Bond Market ETF (BND) [EF]		01/24/2024	P	$15,001 - $50,000	
Samuel Gowing Trust ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]		01/24/2024	S (partial)	$1,001 - $15,000	☑
Samuel Gowing Trust ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		01/24/2024	S (partial)	$15,001 - $50,000	☑
Samuel Gowing Trust ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		01/24/2024	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Inherited IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	JT	04/02/2024	S (partial)	$15,001 - $50,000	
Inherited IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	JT	10/03/2024	S (partial)	$1,001 - $15,000	
Inherited IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	JT	04/02/2024	S (partial)	$1,001 - $15,000	
Inherited IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	10/03/2024	S (partial)	$1,001 - $15,000	
Inherited IRA ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]	JT	04/02/2024	S (partial)	$1,001 - $15,000	
David's IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	01/22/2024	P	$1,001 - $15,000	
David's IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	07/09/2024	P	$1,001 - $15,000	
David's IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	01/24/2024	P	$15,001 - $50,000	
David's IRA ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]	SP	01/24/2024	S (partial)	$15,001 - $50,000	
David's IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	11/14/2024	P	$1,001 - $15,000	
David's IRA ⇒ iShares ESG Aware MSCI USA Small-Cap ETF (ESML) [EF]	SP	04/17/2024	P	$1,001 - $15,000	
David's IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	01/24/2024	P	$1,001 - $15,000	
Kim's Roth IRA - 2014 ⇒ Vanguard ESG International Stock ETF (VSGX) [EF]		04/02/2024	S	$15,001 - $50,000	

* 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

None disclosed.

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
October 2017	Kim Schrier and Franciscan Health	Ongoing leave of absence.
Comments: Formerly Virginia Mason Medical Center		
October 2017	Filer and Franciscan Health - 401(k) Plan	Defined contribution plan that provides service retirement benefits.
October 2017	Filer and Franciscan Health - 403(b) Plan	Defined contribution plan that provides service retirement benefits.
June 2000	Filer and Stanford Health Care Retirement Savings Plan	Defined contribution plan that provides service retirement benefits.

Schedule G: Gifts

None disclosed.

Schedule H: Travel Payments and Reimbursements

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Aspen Institute, Inc. (Congressional Program)	05/25/2024	06/01/2024	Seattle, WA - Sydney, Australia - Seattle, WA	0	✓	✓	✓

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

- Erisa 403b with Franciscan Health
  Description: Previously reported as Kim's 403b with VMMC
- Commonspirit 401(k) with Franciscan Health
  Description: Previously reported as Kim’s 401(a) with VMMC
- Samuel Gowing Trust

Description: Trust for son's education

- David's IRA (Owner: SP)
- Kim's Roth IRA - 2014
- Kim's 403b - Pre-2009
- Stanford Health Care Retirement Savings Plan
  Location: US
- Inherited IRA (Owner: JT)
  Description: Inherited in October, 2021.
- Trust (Owner: JT)
- Schwab Brokerage (Owner: JT)
- Wells Fargo Bank (Owner: JT)
  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

Comments

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. Kim Dr Schrier , 05/15/2025