



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 09/04/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset   | Owner | Value of Asset          | Income Type(s) | Income      | Tx. > \$1,000?           |
|---|-------|-------------------------|----------------|-------------|--------------------------|
| Banner Bank Account [BA]  | SP    | \$100,001 - \$250,000   | None           |             | <input 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"/> |
| 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"/> |
| 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"/> |
| Washington State Teachers Retirement System Defined Benefit Plan [DB] | SP    | \$500,001 - \$1,000,000 | None           |             | <input type="checkbox"/> |
| Cetera Brokerage Account ⇒  |       | \$50,001 -              | Capital Gains, | \$5,001 -   | <input type="checkbox"/> |

| <b>Asset</b>  | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b>       | <b>Income</b>     | <b>Tx. &gt; \$1,000?</b> |
|---|--------------|-----------------------|-----------------------------|-------------------|--------------------------|
| American Investment Company of America Fund Class A [MF]                        |              | \$100,000             | Dividends                   | \$15,000          | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Bridge Builder Core Plus Bond (BBCPX) [MF]  |              | \$1,001 - \$15,000    | Dividends                   | \$201 - \$1,000   | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Bridge Builder INTL Equity (BBIEX) [MF]     |              | \$1,001 - \$15,000    | Capital Gains,<br>Dividends | \$1 - \$200       | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Bridge Builder Large Growth (BBGLX) [MF]    |              | \$1,001 - \$15,000    | Capital Gains,<br>Dividends | \$201 - \$1,000   | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Bridge Builder Large Value (BBVLX) [MF]     |              | \$1,001 - \$15,000    | Capital Gains,<br>Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Bridge Builder Small/Mid Grw (BBGSX) [MF]   |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200       | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Bridge Builder Small/Mid Value (BBVSX) [MF] |              | \$1,001 - \$15,000    | Capital Gains,<br>Dividends | \$201 - \$1,000   | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Dfa INTL Small Company I (DFISX) [MF]       |              | \$1,001 - \$15,000    | Capital Gains,<br>Dividends | \$1 - \$200       | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Edward Jones Money Market Account [BA]      |              | \$15,001 - \$50,000   | Dividends                   | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Federated Instl HI-Yld BD R6 (FIHLX) [MF]   |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200       | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Goldman Fs Government I (FGTXX) [MF]        |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200       | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>iShares Core US Aggregate Bond [EF]         |              | \$1,001 - \$15,000    | Dividends                   | \$201 - \$1,000   | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>iShares Core US Aggregate Bond (AGG) [EF]   |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200       | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>iShares MSCI EAFE Small Cap Et (SCZ) [EF]   |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200       | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>iShares MSCI EAFE Small Cap Et (SCZ) [EF]   |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200       | <input type="checkbox"/> |

| <b>Asset</b>  | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b>       | <b>Income</b>      | <b>Tx. &gt; \$1,000?</b> |
|---|--------------|-----------------------|-----------------------------|--------------------|--------------------------|
| Edward Jones Brokerage Account ⇒<br>JPM Emerging Markets Equity A [MF]        |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Oakmark International R6 (OAZIX) [MF]     |              | None                  | None                        |                    | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>SPDR DJ Global Real Estate ETF (RWO) [EF] |              | None                  | Capital Gains,<br>Dividends | \$201 -<br>\$1,000 | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Vanguard FTSE Dev Mkts ETF [EF]           |              | \$1,001 - \$15,000    | Dividends                   | \$201 -<br>\$1,000 | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Vanguard FTSE Dev Mkts ETF (VEA) [EF]     |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Vanguard FTSE Emerging Mkt ETF (VWO) [EF] |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Vanguard FTSE Emerging Mkt ETF (VWO) [EF] |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Vanguard Growth ETF (VUG) [EF]            |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Vanguard Growth ETF (VUG) [EF]            |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Vanguard Large Cap ETF (VV) [EF]          |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Vanguard Large Cap ETF (VV) [EF]          |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Vanguard Small Cap ETF (VB) [EF]          |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Vanguard Small Cap ETF (VB) [EF]          |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒<br>Vanguard Value ETF (VTV) [EF]             |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒  |              | \$1,001 - \$15,000    | Dividends                   | \$1 - \$200        | <input type="checkbox"/> |

| Asset   | Owner | Value of Asset     | Income Type(s) | Income | Tx. > \$1,000?           |
|---|-------|--------------------|----------------|--------|--------------------------|
| Vanguard Value ETF (VTV) [EF]                                     |       |                    |                |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Bridge Builder Core Plus Bond (BBCPX) [MF]  |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Bridge Builder INTL Equity (BBIEX) [MF]     |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Bridge Builder Large Growth (BBGLX) [MF]    |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Bridge Builder Large Value (BBVLX) [MF]     |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Bridge Builder Small/Mid Grw (BBGSX) [MF]   |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Bridge Builder Small/Mid Value (BBVSX) [MF] |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Dfa INTL Small Company I (DFISX) [MF]       |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Federated Instl HI-Yld BD R6 (FIHLX) [MF]   |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>iShares Core US Aggregate Bond (AGG) [EF]   |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>iShares Core US Aggregate Bond (AGG) [EF]   |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>iShares MSCI EAFE Small Cap Et (SCZ) [EF]   |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>iShares MSCI EAFE Small Cap Et (SCZ) [EF]   |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>JPM Emerging Markets Equity A [MF]          |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Vanguard FTSE Dev Mkts ETF (VEA) [EF]       |       | \$1,001 - \$15,000 | Tax-Deferred   |        | <input type="checkbox"/> |

| Asset   | Owner | Value of Asset        | Income Type(s) | Income | Tx. > \$1,000?           |
|---|-------|-----------------------|----------------|--------|--------------------------|
| Edward Jones IRA ⇒<br>Vanguard FTSE Dev Mkts ETF (VEA) [EF]   |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Vanguard FTSE Emerging Mkt ETF (VWO) [EF]   |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Vanguard FTSE Emerging Mkt ETF (VWO) [EF]   |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Vanguard Growth ETF (VUG) [EF]  |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Vanguard Growth ETF (VUG) [EF]  |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Vanguard Large Cap ETF (VV) [EF]  |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Vanguard Large Cap ETF (VV) [EF]  |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Vanguard Small Cap ETF (VB) [EF]  |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Vanguard Small Cap ETF (VB) [EF]  |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Vanguard Value ETF (VTV) [EF]   |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| Edward Jones IRA ⇒<br>Vanguard Value ETF (VTV) [EF]   |       | \$1,001 - \$15,000    | Tax-Deferred   |        | <input type="checkbox"/> |
| Lincoln Financial Group Variable Annuity ⇒<br>6 Year Capital Strength Cap 20% Protect [OT]<br>DESCRIPTION: Variable Annuity |       | \$15,001 - \$50,000   | None           |        | <input type="checkbox"/> |
| Lincoln Financial Group Variable Annuity ⇒<br>6 Year S&P 500 Cap 20% Protection [OT]<br>DESCRIPTION: Variable Annuity       |       | \$15,001 - \$50,000   | None           |        | <input type="checkbox"/> |
| Seattle Metropolitan Chamber of Commerce 401(k) Plan ⇒<br>AF Trgt Date 2025 R6 [MF]   |       | \$100,001 - \$250,000 | Tax-Deferred   |        | <input type="checkbox"/> |

| Asset  | Owner | Value of Asset      | Income Type(s) | Income | Tx. > \$1,000?           |
|--|-------|---------------------|----------------|--------|--------------------------|
| TIAA State Board Retirement Plan ⇒<br>T-C Lifecycle 2025-Inst (TCLFX) [MF] |       | \$15,001 - \$50,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| TIAA State Board Retirement Plan ⇒<br>T-C Lifecycle 2025-Inst (TCLFX) [MF] |       | \$15,001 - \$50,000 | Tax-Deferred   |        | <input 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?      |
|--|-------|------------|----------|--------------------|--------------------------|
| TIAA State Board Retirement Plan ⇒<br>Nuveen Lifecycle 2025 Fund R6 (TCYIX) [MF]                                   |       | 07/22/2024 | S        | \$1,001 - \$15,000 | <input type="checkbox"/> |
| TIAA State Board Retirement Plan ⇒<br>Vanguard Real Estate Index Fund Institutional Shares (VGSNX) [MF]            |       | 07/23/2024 | P        | \$1,001 - \$15,000 |                          |
| TIAA State Board Retirement Plan ⇒<br>Nuveen Core Bond Fund R6 (TIBDX) [MF]  |       | 07/23/2024 | P        | \$1,001 - \$15,000 |                          |
| TIAA State Board Retirement Plan ⇒<br>CREF Inflation-Linked Bond Account - R3 (QCILIX) [MF]                        |       | 07/23/2024 | P        | \$1,001 - \$15,000 |                          |
| TIAA State Board Retirement Plan ⇒<br>Vanguard Institutional Index (VINIX) [MF]                                    |       | 07/23/2024 | P        | \$1,001 - \$15,000 |                          |
| TIAA State Board Retirement Plan ⇒<br>Vanguard Extended Market Index Fund Institutional Select Shares (VSEMX) [MF] |       | 07/23/2024 | P        | \$1,001 - \$15,000 |                          |
| TIAA State Board Retirement Plan ⇒<br>TIAA Traditional [FN]  |       | 07/23/2024 | P        | \$1,001 - \$15,000 |                          |
| TIAA State Board Retirement Plan ⇒<br>Nuveen International Equity Index Fund R6 (TCIEIX) [MF]                      |       | 07/23/2024 | P        | \$1,001 - \$15,000 |                          |
| Cetera Brokerage Account ⇒<br>American Funds Investment Co of America A (AIVSX) [MF]                               |       | 12/18/2024 | P        | \$1,001 - \$15,000 |                          |
| TIAA State Board Retirement Plan ⇒<br>Nuveen Lifecycle 2025 Fund R6 (TCYIX) [MF]                                   |       | 07/22/2024 | P        | \$1,001 - \$15,000 |                          |

| Asset   | Owner | Date       | Tx. Type | Amount             | Cap. Gains > \$200? |
|---|-------|------------|----------|--------------------|---------------------|
| TIAA State Board Retirement Plan ⇒<br>TIAA Traditional [FN] |       | 09/25/2024 | P        | \$1,001 - \$15,000 |                     |

\* 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

| 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

| Source                                       | Trip Details |            |  |                  | Inclusions                          |                                     |                                     |
|--|--------------|------------|--|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
|  | Start Date   | End Date   | Itinerary  | Days at Own Exp. | Lodging?                            | Food?                               | Family?                             |
| US Association of Former Members of Congress | 01/20/2024   | 01/27/2024 | Seattle, WA - Tokyo & Okinawa, Japan - Seattle, WA | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| American Israel Education Foundation Inc.    | 03/24/2024   | 03/31/2024 | Washington, D.C. - Jerusalem, Israel - Seattle, WA | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

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

## 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 , 09/04/2025