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# Annual Report for Calendar 2024

The Honorable Patty Murray (Murray, Patty)

Filed 04/23/2025 @ 11:30 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	J P Morgan Chase New York City, NY	> \$1,000	n/a
3	Self	Retirement	J P Morgan Chase New York City, NY	\$4,940.44	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	\$15,001 - \$50,000	Dividends,	None (or less than \$201)
2	<b>USSFCU</b> (Washington, DC) <i>Type: Savings,</i>	Bank Deposit	Joint	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
3	<b>USSFCU</b> (Washington, DC) <i>Type: Certificate of Deposit,</i>	Bank Deposit	Joint	\$100,001 - \$250,000	Dividends,	\$5,001 - \$15,000
4	<b>USSFCU</b> (Washington, DC) <i>Type: Money Market Account,</i>	Bank Deposit	Joint	\$50,001 - \$100,000	Dividends,	\$201 - \$1,000
5	<b>USSFCU</b> (Washington, DC) <i>Type: Certificate of Deposit,</i>	Bank Deposit	Joint	\$100,001 - \$250,000	Dividends,	\$2,501 - \$5,000
6	<b>USSFCU</b> (Washington, DC) <i>Type: Checking,</i>	Bank Deposit	Joint	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
7	<b>Whidbey Island Bank</b> (Freeland, WA) <i>Type: Checking,</i>	Bank Deposit	Joint	\$50,001 - \$100,000	Interest,	None (or less than \$201)
8	<b>Whidbey Island Bank</b> (Freeland, WA) <i>Type: Savings,</i>	Bank Deposit	Joint	\$50,001 - \$100,000	Interest,	None (or less than \$201)
9	<b>Fidelity</b> (Seattle, WA) <i>Type: Checking,</i>	Bank Deposit	Joint	\$1,001 - \$15,000	Interest,	\$201 - \$1,000
10	<b>Spouse IRA</b>	Retirement Plans IRA	Spouse			
10.1	<a href="#">PQIAX</a> - <b>Principal Equity Income A</b> <b>(NASDAQ)</b>	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
11	<b>Self IRA</b>	Retirement Plans IRA	Self			
11.1	<a href="#">PQIAX</a> - <b>Principal Equity Income A</b> <b>(NASDAQ)</b>	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
12	<b>Spouse IRA</b>	Retirement Plans IRA	Spouse			

Asset	Asset Type	Owner	Value	Income Type	Income
12.1 <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)
12.2 <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)
12.3 <a href="#">VWUSX</a> - Vanguard U.S. Growth Fund Investor Shares	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
13 <b>Variable Annuity</b> <i>Provider: Fidelity</i>	Annuity Variable Annuity	Spouse			
13.1 <b>FAVAM</b>	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
14 <b>Spouse IRA</b>	Retirement Plans IRA	Spouse			
14.1 <a href="#">FFTHX</a> - Fidelity Freedom 2035	Mutual Funds Mutual Fund	Spouse	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
14.2 <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)
14.3 <a href="#">FXAIX</a> - Fidelity 500 Index Fund	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
14.4 <b>FDRXX-Fidelity Cash Reserves</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
14.5 <a href="#">FFFEX</a> - Fidelity Freedom 2030	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
14.6 <a href="#">FMAGX</a> - Fidelity Magellan	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
14.7 <a href="#">FBALX</a> - Fidelity Balanced	Mutual Funds Mutual Fund	Spouse	\$500,001 - \$1,000,000	Excepted Investment Fund,	None (or less than \$201)
14.8 <a href="#">FGRIX</a> - Fidelity Growth & Income	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)

14.9	<a href="#">FFFFX</a> - Fidelity Freedom 2040 Fund Asset	Mutual Funds Asset Type Mutual Fund	Spouse Owner	\$250,001 - Value \$500,000	Excepted Income Type Investment Fund,	None (or less Income than \$201)
15	<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)
16	<b>Guardian Fixed Target Annuity</b> <i>Provider: The Guardian Insurance and Annuity Company, Inc.</i>	Annuity Fixed	Spouse	\$100,001 - \$250,000	Interest,	None (or less than \$201)
17	<b>State of Washington Retirement Plan PERS1</b>	Retirement Plans Defined Benefit Pension Plan	Self	\$15,001 - \$50,000	Interest,	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	--	FAVAM	Purchase	03/21/2024	\$50,001 - \$100,000	n/a
2	Spouse	--	PQIAX	Sale (Partial)	11/12/2024	\$1,001 - \$15,000	n/a
3	Self	--	PQIAX	Sale (Partial)	11/12/2024	\$1,001 - \$15,000	n/a
4	Spouse	--	FFFEX	Sale (Partial)	11/08/2024	\$50,001 - \$100,000	n/a
5	Spouse	--	Guardian Fixed Target Annuity	Purchase	12/13/2024	\$50,001 - \$100,000	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.*

