



Filing ID #10070301

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Raul Ruiz  
**Status:** Member  
**State/District:** CA25

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 07/17/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America - Checking [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Eisenhower Medical Center Retirement Plan [PE]	SP	Undetermined	Tax-Deferred		<input type="checkbox"/>
My Savings Direct [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
ScholarShare 529 Plan #1 ⇒ 2032/2033 Enrollment Portfolio Passive [5F]	DC	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: CA					
ScholarShare 529 Plan #2 ⇒ 2032/2033 Enrollment Portfolio Passive [5F]	DC	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: CA					
Summit Wealth Management - IRA ⇒ Alerian MLP ETF (AMLP) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Allspring Money Market Fund - Premier Class (WMPXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Money Market Fund					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Summit Wealth Management - IRA ⇒ DoubleLine Total Return Bond Fund Class I (DBLTX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ First Trust NASDAQ Technology Dividend Index Fund (TDIV) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ First Trust Water ETF (FIW) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Global X NASDAQ 100 Covered Call ETF (QYLD) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Invesco BuyBack Achievers ETF (PKW) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Invesco Preferred ETF (PGX) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares 0-5 Year TIPS Bond ETF (STIP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares Core High Dividend ETF (HDV) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares North American Natural Resources ETF (IGE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares Trust iShares U.S. Transportation ETF (IYT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares U.S. Industrials ETF (IYJ) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ iShares U.S. Medical Devices ETF (IHI) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Summit Wealth Management - IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Multi-Asset Diversified Income Index Fund (MDIV) [EF]					
Summit Wealth Management - IRA ⇒ PGIM Floating Rate Income Fund Class Z (FRFZX) [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ PIMCO Income Fund Insti Class (PIMIX) [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ SPDR Bloomberg Convertible Securities ETF (CWB) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Summit Wealth Management - IRA ⇒ The Income Fund of America, Class F-2 Shares (AMEFX) [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Vanguard Health Care ETF (VHT) [EF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Vanguard Information Tech ETF (VGT) [EF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Vanguard Mega Cap ETF (MGC) [EF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Summit Wealth Management - IRA ⇒ Wells Fargo Bank, N.A. [IH]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
UC Retirement Savings Plan ⇒ UC Savings Fund [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
US Acute Care Solutions Profit Sharing/401(k) Plan and		\$250,001 -		Tax-Deferred	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Trust ⇒ Fidelity Freedom Index 2035 Fund - Investor Class (FIHFX) [MF]		\$500,000			

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Summit Wealth Management - IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		10/16/2024	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
Innercare	Spouse Salary	N/A

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Founder	Future Physician Leaders

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2014	University of California Riverside School of Medicine	Leave of absence without pay for Dr. Raul Ruiz, Senior Associate Dean for Community Partnership & Engagement, and Health Services Clinical Professor. Originally effective January 1, 2015 - December 31, 2016; extended through December 31, 2025.

## 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?
The Aspen Institute, Inc. (Congressional Program)	05/25/2024	06/01/2024	Los Angeles - Sydney - Canberra - Los Angeles	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Organization of Iranian American Communities	06/28/2024	07/02/2024	Los Angeles - Auvers-sur-Oise, France - Los Angeles	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
U.S. Association of Former Members of Congress (FMC)	03/23/2024	03/29/2024	Los Angeles - Seoul, Korea - Busan, Korea - Los Angeles	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

None disclosed.

## SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- UC Retirement Savings Plan
- US Acute Care Solutions Profit Sharing/401(k) Plan and Trust
- Summit Wealth Management - IRA
- ScholarShare 529 Plan #1 (Owner: DC)  
LOCATION: CA
- ScholarShare 529 Plan #2 (Owner: DC)  
LOCATION: CA

## 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. Raul Ruiz , 07/17/2025