



Filing ID #10066875

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Rick Larsen
Status: Member
State/District: WA02

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 07/14/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-----------------------|----------------|-----------------|-------------------------------------|
| Riversource indexed universal life insurance/S&P 500 Indexed Account [WU] DESCRIPTION: \$350 monthly premium for life insurance totalling \$4200 annually | | \$100,001 - \$250,000 | None | | <input checked="" type="checkbox"/> |
| Riversource RAVA 5 Advantage Variable Annuity/VP Moderate Portfolio Class 2 [MF] DESCRIPTION: Annuity that holds mutual fund. Retirement asset | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Ameriprise One Account ⇒ Ameriprise Insured Money Market [BA] DESCRIPTION: Money market account within the Ameriprise One Financial Account | JT | \$1,001 - \$15,000 | Interest | \$18.32 | <input checked="" type="checkbox"/> |
| Ameriprise One Account ⇒ CNL Healthcare Properties Inc (widely held) [RE] DESCRIPTION: Changed reporting format to be consistent with other assets | JT | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Ameriprise One Account ⇒ Fidelity Insti Money Market Funds Money Market Port - Inst Cl (FNSXX) [MF] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| Ameriprise One Account ⇒ Western Asset Intermediate-Term Municipals Fund Class A (SBLTX) [MF] DESCRIPTION: Changed reporting to be consistent with other assets | JT | \$1 - \$1,000 | None | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|---------------------|-------------|-------------------------------------|
| Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ American Century Focused Dynamic Growth Fund - I Class (ACFSX) [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Baron Focused Growth Fund Inst Shs (BFGIX) [MF] | JT | \$1,001 - \$15,000 | None | | <input checked="" type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ ClearBridge Select Fd I (LBFIX) [MF] | JT | \$1,001 - \$15,000 | None | | <input checked="" type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Eaton Vance Emerging and Frontier Countries Equity Fund I (EICOX) [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Fidelity Advisor Growth Opportunities Fund: Class I (FAGCX) [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Fidelity Advisor International Small Cap Fund: Class I (FIXIX) [MF] | JT | \$1,001 - \$15,000 | Dividends | None | <input type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Oberweis Small-Cap Opportunities Fund Institutional Class (OBSIX) [MF] | JT | \$1,001 - \$15,000 | Dividends, Interest | None | <input type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ PGIM Jennison International Opportunities Fund Class Z (PWJZX) [MF] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Trust ⇒ ACC Cash Reserve Certificate [BA] | JT | None | Interest | None | <input type="checkbox"/> |
| DESCRIPTION: Moved balance (\$1,001) into ONE Account in 2022. End value is 0. Keeping in portfolio for possible future use | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust ⇒ Condo Property, Everett WA [RP] | JT | \$250,001 - \$500,000 | None | | <input type="checkbox"/> |
| LOCATION: Everett, WA, US | | | | | |
| DESCRIPTION: Created Revocable Living Trust on March 18, 2018. Moved Everett property to the RLT on March 27, 2018 | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|---------------------|----------------|-----------------|-------------------------------------|
| Richard R Larsen and Tiia I Karlen Revocable Trust ⇒ Federal Congressional Credit Union/Money Market Account [BA] | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Ameriprise Insured Money Market [BA] | JT | \$1,001 - \$15,000 | Interest | \$12.77 | <input type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Columbia Strategic Municipal Income Fund Class I (CATZX) [MF] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Goldman Sachs Dynamic Municipal Income Fund - Investor Class (GUIRX) [MF] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Invesco Rochester Municipal Opportunities Fund Class Y (ORNYX) [MF] | JT | None | None | | <input checked="" type="checkbox"/> |
| DESCRIPTION: sold in total in 2024. recorded here to show that it has 0 value. Reporting for transparency. Did not earn more than \$200 in income on sale | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Invesco SteelPath MLP Alpha Fund Class Y (MLPOX) [MF] | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ JHF Municipal Opportunities Fund - Class I (JTBDX) [MF] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| DESCRIPTION: same as John Hancock Fund Municipal Opportunity from CY 22. Just a name change | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Macquarie National High-Yield Municipal Bond Fund Institutional (DVHIX) [MF] | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| DESCRIPTION: Macquarie changed its Delaware-named funds to Macquarie name on December 31, 2024. However it is the same fund as the Delaware previously reported. Note ticker symbols are the same. | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ NYLI Cushing MLP Premier Fund Class I (CSHZX) [MF] | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| DESCRIPTION: No transaction. This fund was rebranded by fund owners. It has the same ticker code as the Mainstay fund so wasn't a purchase, sale or exchange. Rebrand occurred in August 2024 per news reports. However, there was a purchase of additional units | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ NYLI MacKay Strategic Muni Allocation Fund Class I (MTFGX) [MF] | JT | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| DESCRIPTION: Fund is rebranded by fund owners. Was not a sale, exchange of purchase. Per news reports, rebrand occurred in August 2024. Ticker code is same as the Mainstay fund reported on CY 2023 report. However there was a separate purchase of additional units | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|---------------------|----------------|-------------|-------------------------------------|
| PGIM Jennison MLP Fund Class Z (PRPZX) [MF] | | | | | |
| Richard R Larsen IRA ⇒ American Water Works Company, Inc. (AWK) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Ameriprise Brokerage Account/Ameriprise Insured Money Market [BA] | | \$1,001 - \$15,000 | Interest | \$3.44 | <input type="checkbox"/> |
| DESCRIPTION: Money market account within IRA | | | | | |
| Richard R Larsen IRA ⇒ Amgen Inc. (AMGN) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Apple Inc. (AAPL) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Ares Industrial REIT Inc Cl T [RE] | | \$15,001 - \$50,000 | None | | <input type="checkbox"/> |
| Richard R Larsen IRA ⇒ Booz Allen Hamilton Holding Corporation (BAH) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Richard R Larsen IRA ⇒ Broadcom Inc. (AVGO) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Colgate-Palmolive Company Common Stock (CL) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Richard R Larsen IRA ⇒ Comcast Corporation - Class A (CMCSA) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Costco Wholesale Corporation (COST) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|--------------------|----------------|-------------|-------------------------------------|
| Richard R Larsen IRA ⇒ EOG Resources, Inc. (EOG) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Essex Property Trust, Inc. (ESS) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: As noted in previous FD, the equity portfolio sits in this IRA and sale/purchase decisions sit solely with the financial advisor. Over the course of CY2024, the advisor purchased shares of this equity. No one purchase was over \$1k. However, the total amount at the end of CY24 put the value over \$1k, which I first noticed when developing this FD. It is therefore reported here. Pioneer shares were sold to purchase this asset. Again, sale was under \$1k so not reported otherwise | | | | | |
| Richard R Larsen IRA ⇒ FedEx Corporation Common Stock (FDX) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Richard R Larsen IRA ⇒ General Dynamics Corporation Common Stock (GD) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Goldman Sachs Group, Inc. (GS) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Richard R Larsen IRA ⇒ Home Depot, Inc. (HD) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ JP Morgan Chase & Co. (JPM) [ST] | | \$1 - \$1,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Marsh & McLennan Companies, Inc. Common Stock (MMC) [ST] | | \$1 - \$1,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|--------------------|----------------|-------------|-------------------------------------|
| Mastercard Incorporated Common Stock (MA) [ST] | | | | | |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Microsoft Corporation (MSFT) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Mondelez International, Inc. - Class A Common Stock (MDLZ) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Motorola Solutions, Inc. Common Stock (MSI) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Nasdaq, Inc. (NDAQ) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ NextEra Energy, Inc. (NEE) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Old Dominion Freight Line, Inc. - Common Stock (ODFL) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| | | | | | |
| Richard R Larsen IRA ⇒ Paychex, Inc. - Common Stock (PAYX) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ ProLogis, Inc. (PLD) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|--------------------|----------------|-------------|-------------------------------------|
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ S&P Global Inc. Common Stock (SPGI) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Stryker Corporation (SYK) [ST] | | \$1 - \$1,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ TJX Companies, Inc. (TJX) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Visa Inc. (V) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: RRL IRA in a SPS Advisor managed account in which we do not control selection of assets nor control the trades of the assets. Dividend income reinvested into IRA asset | | | | | |
| Richard R Larsen IRA ⇒ Zoetis Inc. Class A Common Stock (ZTS) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Richard R Larsen Roth IRA ⇒ Allspring Special Small Cap Value Fund Institutional Class (ESPNX) [MF] | | None | None | | <input checked="" type="checkbox"/> |
| DESCRIPTION: sold in total in 2024. recorded here to show that it has 0 value. Reporting for transparency. Did not earn more than \$200 in income on sale | | | | | |
| Richard R Larsen Roth IRA ⇒ American Century Mid Cap Value Fund - I Class (AVUAX) [MF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Richard R Larsen Roth IRA ⇒ Ameriprise Bank Insured Sweep Account [BA] | | \$1,001 - \$15,000 | Interest | \$3.21 | <input type="checkbox"/> |
| Richard R Larsen Roth IRA ⇒ Invesco Small Cap Value Class Y (VSMIX) [MF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|--------------------|----------------|-------------|-------------------------------------|
| Richard R Larsen Roth IRA ⇒ Macquarie Small Cap Core Fund Institutional (DCCIX) [MF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: Delaware rebranded its funds to Macquarie funds at end of CY 2024 per news reports. The ticker code of this fund is the same as the Delaware neared fund from CY 2023 report. Not a sale, purchase or exchange. | | | | | |
| Richard R Larsen Roth IRA ⇒ Oberweis Small-Cap Opportunities Fund Institutional Class (OBSIX) [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Richard R Larsen Roth IRA ⇒ Value Line Mid Cap Focused Fund, Inc. Institutional Class (VLMIX) [MF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Richard R Larsen Roth IRA ⇒ Virtus KAR Mid-Cap Growth Fund I (PICMX) [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Tiia Ingrid Karlen IRA ⇒ American Century Focused Dynamic Growth Fund - I Class (ACFSX) [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Tiia Ingrid Karlen IRA ⇒ Baron Focused Growth Fund Inst Shs (BFGIX) [MF] | | \$1,001 - \$15,000 | None | | <input checked="" type="checkbox"/> |
| Tiia Ingrid Karlen IRA ⇒ ClearBridge Select Fd I (LBFIX) [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Tiia Ingrid Karlen IRA ⇒ Eaton Vance Emerging and Frontier Countries Equity Fund I (EICOX) [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Tiia Ingrid Karlen IRA ⇒ Fidelity Advisor Growth Opportunities Fund: Class I (FAGCX) [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Tiia Ingrid Karlen IRA ⇒ Fidelity Advisor International Small Cap Fund: Class I (FIXIX) [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Tiia Ingrid Karlen IRA ⇒ Oberweis Small-Cap Opportunities Fund Institutional Class (OBSIX) [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Tiia Ingrid Karlen IRA ⇒ PGIM Jennison International Opportunities Fund Class Z (PWJZX) [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|--------------------|----------------|-----------------|--------------------------|
| Tiia Ingrid Karlen Roth IRA ⇒ Ameriprise Insured Money Market Account [MF] | | \$1 - \$1,000 | Interest | \$2.22 | <input type="checkbox"/> |
| Tiia Ingrid Karlen Roth IRA ⇒ ClearBridge International Growth Fund Class I (LMGNX) [MF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: income reinvested back into asset | | | | | |
| Tiia Ingrid Karlen Roth IRA ⇒ Fidelity Advisor International Small Cap Fund: Class I (FIXIX) [MF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: income reinvested back into asset | | | | | |
| Tiia Ingrid Karlen Roth IRA ⇒ Invesco International Small-Mid Company Fund Class Y (OSMYX) [MF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: income reinvested into asset | | | | | |
| Tiia Ingrid Karlen Roth IRA ⇒ John Hancock Disciplined Value International Fund Class I (JDVIX) [MF] | | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| DESCRIPTION: income reinvested back into asset | | | | | |
| Tiia Ingrid Karlen Roth IRA ⇒ PGIM Jennison International Opportunities Fund Class Z (PWJZX) [MF] | | \$1,001 - \$15,000 | Dividends | None | <input type="checkbox"/> |
| DESCRIPTION: income reinvested back into asset | | | | | |

* 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? |
|---|-------|------------|----------|--------------------|--------------------------|
| Richard R Larsen IRA ⇒ Rick Larsen IRA Ameriprise SPS Managed Account ⇒ Bristol-Myers Squibb Company (BMY) [ST] | | 01/09/2024 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: sale of asset as part of quarterly portfolio rebalancing. Asset manager-initiated sale | | | | | |
| Richard R Larsen IRA ⇒ Rick Larsen IRA Ameriprise SPS Managed Account ⇒ The Hershey Company (HSY) [ST] | | 01/09/2024 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: sale as part of quarterly portfolio rebalancing; Asset manager-initiated transaction | | | | | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|-------------|--------------------|--------------------------|
| Richard R Larsen IRA ⇒ Rick Larsen IRA Ameriprise SPS Managed Account ⇒ Colgate-Palmolive Company (CL) [ST] DESCRIPTION: sale as part of quarterly portfolio rebalancing; Asset manager-initiated transaction | | 01/09/2024 | P | \$1,001 - \$15,000 | |
| Richard R Larsen IRA ⇒ Rick Larsen IRA Ameriprise SPS Managed Account ⇒ Zoetis Inc. Class A (ZTS) [ST] DESCRIPTION: sale as part of quarterly portfolio rebalancing; Asset manager-initiated transaction | | 01/09/2024 | P | \$1,001 - \$15,000 | |
| Richard R Larsen IRA ⇒ Rick Larsen IRA Ameriprise SPS Managed Account ⇒ FedEx Corporation Common Stock (FDX) [ST] DESCRIPTION: part of quarterly portfolio rebalancing conducted by asset manager and which i do not control per contract | | 04/04/2024 | P | \$1,001 - \$15,000 | |
| Richard R Larsen IRA ⇒ Rick Larsen IRA Ameriprise SPS Managed Account ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST] DESCRIPTION: part of a quarterly rebalancing of portfolio and conducted by asset manager without my control per contract | | 04/04/2024 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Riversource indexed universal life insurance/S&P 500 Indexed Account [WU] | | Monthly | P | \$350.00 | |
| Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ Baron Focused Growth Fund Inst Shs (BFGIX) [MF] | JT | 07/02/2024 | P | \$1,001 - \$15,000 | |
| Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 ⇒ ClearBridge Select Fd I (LBFIX) [MF] DESCRIPTION: Used funds from this fund to purchase BFGIX | JT | 07/02/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Richard R Larsen IRA ⇒ Goldman Sachs Group, Inc. (GS) [ST] DESCRIPTION: Part of quarterly portfolio rebalance | | 07/02/2024 | P | \$1,001 - \$15,000 | |
| Richard R Larsen IRA ⇒ Hartford Financial Services Group, Inc. (HIG) [ST] DESCRIPTION: Part of quarterly portfolio rebalance | | 07/02/2024 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Richard R Larsen IRA ⇒ Old Dominion Freight Line, Inc. - Common Stock (ODFL) [ST] DESCRIPTION: Quarterly portfolio rebalance | | 07/02/2024 | P | \$1,001 - \$15,000 | |
| Richard R Larsen IRA ⇒ | | 07/02/2024 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|-------------|--------------------|--------------------------|
| Waste Management, Inc. Common Stock (WM) [ST] | | | | | |
| DESCRIPTION: Quarterly portfolio rebalance | | | | | |
| Tiia Ingrid Karlen IRA ⇒ Baron Focused Growth Fund Inst Shs (BFGIX) [MF] | | 07/02/2024 | P | \$1,001 - \$15,000 | |
| Richard R Larsen Roth IRA ⇒ Allspring Special Small Cap Value Fund Institutional Class (ESPNX) [MF] | | 02/20/2024 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: sale did not earn income over \$200 | | | | | |
| Richard R Larsen Roth IRA ⇒ Invesco Small Cap Value Class Y (VSMIX) [MF] | | 02/20/2024 | P | \$1,001 - \$15,000 | |
| Ameriprise One Account ⇒ Ameriprise Insured Money Market [BA] | JT | 01/09/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units of GUIRX mutual fund | | | | | |
| Ameriprise One Account ⇒ Ameriprise Insured Money Market [BA] | JT | 01/09/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units of CSHZX mutual fund | | | | | |
| Ameriprise One Account ⇒ Ameriprise Insured Money Market [BA] | JT | 01/09/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units of MTFGX mutual fund | | | | | |
| Ameriprise One Account ⇒ Ameriprise Insured Money Market [BA] | JT | 01/09/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: Purchase of ORNYX mutual fund units | | | | | |
| Ameriprise One Account ⇒ Ameriprise Insured Money Market [BA] | JT | 01/09/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units of PRPZX mutual fund | | | | | |
| Ameriprise One Account ⇒ Ameriprise Insured Money Market [BA] | JT | 01/09/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units of JTBDX mutual fund | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Columbia Strategic Municipal Income Fund Class I (CATZX) [MF] | JT | 01/09/2024 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ | JT | 01/09/2024 | P | \$1,001 - \$15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|-------------|---------------------|--------------------------|
| Goldman Sachs Dynamic Municipal Income Fund - Investor Class (GUIRX) [MF] DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Invesco Rochester Municipal Opportunities Fund Class Y (ORNYX) [MF] | JT | 04/04/2024 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: sale did not earn income of more that \$200 | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Macquarie National High-Yield Municipal Bond Fund Institutional (DVHIX) [MF] | JT | 04/04/2024 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Purchase of DVHIX, named Delaware National High Yield Municipal Bond at the time of purchase. Macquarie rebranded to a Macquarie brand on Dec 31, 2024 but ticker did not change | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Invesco SteelPath MLP Alpha Fund Class Y (MLPOX) [MF] | JT | 01/09/2024 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Purchase of additional units using Ameriprise ONE funds | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ JHF Municipal Opportunities Fund - Class I (JTBDX) [MF] | JT | 01/09/2024 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ NYLI Cushing MLP Premier Fund Class I (CSHZX) [MF] | JT | 01/09/2024 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ Invesco Rochester Municipal Opportunities Fund Class Y (ORNYX) [MF] | JT | 01/09/2024 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Purchase from funds in in Ameriprise ONE account | | | | | |
| Riversource indexed universal life insurance/S&P 500 Indexed Account [WU] | | Monthly | P | \$350.00 | |
| DESCRIPTION: monthly premium | | | | | |
| Ameriprise One Account ⇒ Ameriprise Insured Money Market [BA] | JT | 01/09/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units of CATZX mutual fund | | | | | |
| Ameriprise One Account ⇒ Ameriprise Insured Money Market [BA] | JT | 01/09/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units of MLPOX mutual fund | | | | | |
| Ameriprise One Account ⇒ | JT | 10/31/2024 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|-------|------------|----------------|---------------------|--------------------------|
| Ameriprise Insured Money Market [BA] | | | (partial) | | <input type="checkbox"/> |
| DESCRIPTION: Used to purchase FNSXX | | | | | |
| Ameriprise One Account ⇒ Fidelity Insti Money Market Funds Money Market Port - Inst Cl (FNSXX) [MF] | JT | 10/31/2024 | P | \$15,001 - \$50,000 | |
| Tiia Ingrid Karlen IRA ⇒ ClearBridge Select Fd I (LBFIX) [MF] | | 07/02/2024 | S (partial) | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Tiia Ingrid Karlen IRA ⇒ Baron Focused Growth Fund Inst Shs (BFGIX) [MF] | | 07/02/2024 | P | \$1,001 - \$15,000 | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ NYLI MacKay Strategic Muni Allocation Fund Class I (MTFGX) [MF] | JT | 01/09/2024 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units | | | | | |
| Richard R Larsen and Tiia I Karlen Revocable Trust Fund 1 ⇒ PGIM Jennison Energy Infrastructure Fund - Class Z (PRPZX) [MF] | JT | 01/09/2024 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units | | | | | |

* 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

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|-----------|---------------|----------------------------------|-----------------------|
| JT | BAC Loans | December 2011 | Mortgage for secondary 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

| Trip Details | | | | | Inclusions | | |
|--|------------|------------|---|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Source | Start Date | End Date | Itinerary | Days at Own Exp. | Lodging? | Food? | Family? |
| The Aspen Institute | 02/17/2024 | 02/24/2024 | Washington, DC - Capetown, RSA - Washington, DC | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| The Aspen Institute | 04/01/2024 | 04/06/2024 | Washingto, DC - Bellagio, Italy - Washington, DC | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| The Aspen Institute | 08/11/2024 | 08/16/2024 | Seattle, WA - Dublin, Ireland - Belfast, Northern Ireland, UK - Seattle, WA | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Ripon Soc/Franklin Center for Global Policy Exchange | 11/07/2024 | 11/12/2024 | Seattle, WA - Vienna, Austria - Washington, DC | 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

| |
|--|
| <ul style="list-style-type: none">Richard R Larsen and Tiia I Karlen Revocable Living Trust Fund 2 (Owner: JT) DESCRIPTION: Created Revocable Living Trust on March 18, 2018.Richard R Larsen IRATiia Ingrid Karlen Roth IRARichard R Larsen Roth IRAAmeriprise One Account (Owner: JT) LOCATION: USTiia Ingrid Karlen IRARichard R Larsen and Tiia I Karlen Revocable Trust Fund 1 (Owner: JT)Richard R Larsen and Tiia I Karlen Revocable Trust (Owner: JT)Richard R Larsen IRA ⇒ Rick Larsen IRA Ameriprise SPS Managed Account |
|--|

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. Rick Larsen , 07/14/2025