



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]		\$100,001 - \$250,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: \$350 monthly premium for life insurance totalling \$4200 annually					
Riversource RAVA 5 Advantage Variable Annuity/VP Moderate Portfolio Class 2 [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Annuity that holds mutual fund. Retirement asset					
Ameriprise One Account ⇒ Ameriprise Insured Money Market [BA]	JT	\$1,001 - \$15,000	Interest	\$18.32	<input checked="" type="checkbox"/>
DESCRIPTION: Money market account within the Ameriprise One Financial Account					
Ameriprise One Account ⇒ CNL Healthcare Properties Inc (widely held) [RE]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Changed reporting format to be consistent with other assets					
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 Municipal Fund Class A (SBLTX) [MF]	JT	\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Changed reporting to be consistent with other assets					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Richard R Larsen and Tiaa 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 Tiaa 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 Tiaa 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 Tiaa 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 Tiaa 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 Tiaa 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 Tiaa 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 Tiaa 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 Tiaa 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 Tiaa 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 Tia 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 Tia 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 Tia 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 Tia 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 Tia 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 Tia 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 Tia 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 Tia 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 Tia 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 Tia 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 or 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 Tia I Karlen Revocable Trust Fund 1 ⇒ JT	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]					
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]					
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]					
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?
Tiiia Ingrid Karlen Roth IRA ⇒ Ameriprise Insured Money Market Account [MF]		\$1 - \$1,000	Interest	\$2.22	<input type="checkbox"/>
Tiiia 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					
Tiiia 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					
Tiiia 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					
Tiiia 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					
Tiiia 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]		01/09/2024	P	\$1,001 - \$15,000	
DESCRIPTION: sale as part of quarterly portfolio rebalancing; Asset manager-initiated transaction					
Richard R Larsen IRA ⇒ Rick Larsen IRA Ameriprise SPS Managed Account ⇒ Zoetis Inc. Class A (ZTS) [ST]		01/09/2024	P	\$1,001 - \$15,000	
DESCRIPTION: sale as part of quarterly portfolio rebalancing; Asset manager-initiated transaction					
Richard R Larsen IRA ⇒ Rick Larsen IRA Ameriprise SPS Managed Account ⇒ FedEx Corporation Common Stock (FDX) [ST]		04/04/2024	P	\$1,001 - \$15,000	
DESCRIPTION: part of quarterly portfolio rebalancing conducted by asset manager and which i do not control per contract					
Richard R Larsen IRA ⇒ Rick Larsen IRA Ameriprise SPS Managed Account ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		04/04/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: part of a quarterly rebalancing of portfolio and conducted by asset manager without my control per contract					
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]	JT	07/02/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Used funds from this fund to purchase BFGIX					
Richard R Larsen IRA ⇒ Goldman Sachs Group, Inc. (GS) [ST]		07/02/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Part of quarterly portfolio rebalance					
Richard R Larsen IRA ⇒ Hartford Financial Services Group, Inc. (HIG) [ST]		07/02/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Part of quarterly portfolio rebalance					
Richard R Larsen IRA ⇒ Old Dominion Freight Line, Inc. - Common Stock (ODFL) [ST]		07/02/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Quarterly portfolio rebalance					
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					
Tiiia 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]					
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 Tiiia 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 Tiiia 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 (GUISX) [MF]					
DESCRIPTION: Use of Ameriprise ONE funds to purchase additional units					
Richard R Larsen and Tia 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 than \$200					
Richard R Larsen and Tia 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 Tia 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 Tia 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 Tia 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 Tia 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)	
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	
Tiiia Ingrid Karlen IRA ⇒ ClearBridge Select Fd I (LBFIX) [MF]		07/02/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Tiiia Ingrid Karlen IRA ⇒ Baron Focused Growth Fund Inst Shs (BFGIX) [MF]		07/02/2024	P	\$1,001 - \$15,000	
Richard R Larsen and Tiiia 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 Tiiia 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

Source	Trip Details				Inclusions		
	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	Washington, 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

- 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 IRA
- Tiia Ingrid Karlen Roth IRA
- Richard R Larsen Roth IRA
- Ameriprise One Account (Owner: JT)
LOCATION: US
- Tiia Ingrid Karlen IRA
- Richard 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