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# Annual Report for Calendar 2024

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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	Salary	National Association of Realtors Chicago, IL	> \$1,000	Terminated employment in Dec. 2024

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>Aspiration</b> (San Francisco, CA) <i>Type:</i> Checking, Savings,	Bank Deposit	Joint	\$15,001 - \$50,000	None,	None (or less than \$201)
2	<b>Aspiration Fund Adviser LLC</b> <i>Company:</i> Aspiration Fund Adviser LLC (Marina Del Rey, CA) <i>Description:</i> Investment Advisory Services	Corporate Securities Non-Public Stock	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
3	<b>IRA Club</b>	Retirement Plans IRA	Self			
3.1	<b>NameCoach Inc.</b> <i>Company:</i> NameCoach Inc. (Palo Alto, CA) <i>Filer comment:</i> Convertible Note. Pronunciation Guide Services	Accounts Receivable From a Business	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
4	<b>National Association of Realtors Pension Plan</b>	Retirement Plans Defined Benefit Pension Plan	Spouse	Unascertainable	None,	None (or less than \$201)
5	<b>UBS Simple IRA</b>	Retirement Plans IRA	Spouse			
5.1	<b><a href="#">JFFCX</a> - Jpmorgan Smartretirement 2055 Fd C</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
6	<b>USAA Federal Savings Bank</b> (San Antonio, TX) <i>Type:</i> Checking,	Bank Deposit	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
7	<b>Arizona 529 Plan</b> <i>Institution:</i> Charles Schwab	Education Savings Plans 529 College Savings Plan	Child			
7.1	<b>Aggressive Track: 80% Equity Portfolio</b>	Mutual Funds Mutual Fund	Child	\$1,001 - \$15,000	Excepted Investment Fund,	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? **No**

#### 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	2021	Joint	Mortgage	0	3.097%% (30 years)	\$500,001 - \$1,000,000	United Wholesale Mortgage Ewing, NJ	n/a
2	2024	Joint	Home Equity Line of Credit	-	10.99% (on demand)	\$50,001 - \$100,000	Searchlight Lending San Rafael, CA	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? **No**

#### 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.*

#### Comments

The National Association of Realtors 401k account included on my House reports for CY 2019-2023 was reported in error and has been removed.