Filing ID #10011463

Financial Disclosure Report

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Filer Information

Name: Hon. Jared Huffman
Status: Member
State/District: CA02

Filing Information

Filing Type: Annual Report
Filing Year: 2015
Filing Date: 06/15/2016

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Abby Huffman 529 Plan ⇒ Fidelity NH Portfolio 2018 Description: Grandparent contribution	DC	$15,001 - $50,000	None		☑
Abby Huffman Child Savings Account ⇒ Abby's Savings Account Description: Abby's personal checking/savings account	DC	$1,001 - $15,000	Interest	$1 - $200	☐
Abby Huffman Child Savings Account ⇒ Capitol One (formerly ING Direct) CD	DC	$1,001 - $15,000	Interest	$1 - $200	☐
ADCO Limited partnership units ⇒ Adhesive Coatings Co. Ltd. Location: Hillsborough, CA, US Description: Limited partnership units in Adhesive Coatings Co.		$1 - $1,000	Capital Gains	$1,001 - $2,500	☑
Bank Accounts ⇒ Bank of America Checking	JT	$1,001 - $15,000	None		☐
Bank Accounts ⇒ Redwood Credit Union - Business Checking Description: Checking for Susan's business	JT	$1,001 - $15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Bank Accounts ⇒ Redwood Credit Union - Checking	JT	$1,001 - $15,000	None		☐
Bank Accounts ⇒ Westamerica Checking	JT	$1,001 - $15,000	None		☐
Fidelity Joint Brokerage Account ⇒ ONEQ NASDAQ Tracking	JT	$15,001 - $50,000	Capital Gains, Dividends	$201 - $1,000	☐
Fidelity Joint Brokerage Account ⇒ SPDR S&P500 ETF DESCRIPTION: Sold shares	JT	$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Claymore Exchange TR Guggenheim Solar DESCRIPTION: Purchased		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund		$50,001 - $100,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market		$1 - $1,000	Tax-Deferred		☑
Jared's Fidelity Rollover IRA ⇒ Fidelity NSDQ Composite Index Tracking DESCRIPTION: Purchased shares		$1,001 - $15,000	Tax-Deferred		☑
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index DESCRIPTION: Purchased		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ iShares Core S&P500 DESCRIPTION: Purchased shares		$1,001 - $15,000	Tax-Deferred		☑
Jared's Fidelity Rollover IRA ⇒ iShares Europe ETF DESCRIPTION: Purchased shares		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ iShares TR Global Clean Energy DESCRIPTION: Purchase of shares		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Neuberger Berman Social Responsible Fund		$15,001 - $50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
DESCRIPTION: Purchased additional shares 12/13					
Jared's Fidelity Rollover IRA ⇒ Neuberger Berman Socially Responsive TR DESCRIPTION: Purchased shares		$15,001 - $50,000	Tax-Deferred		
Jared's Fidelity Rollover IRA ⇒ Powershares Wilder-Hill Clean Energy ETF DESCRIPTION: Purchased shares		$1,001 - $15,000	Tax-Deferred		
Jared's Fidelity Rollover IRA ⇒ Vanguard International Equity Index DESCRIPTION: Purcahsed shares		$1,001 - $15,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ Alger Green Fund		$1,001 - $15,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ Fidelity Cash Reserves DESCRIPTION: Purchase from sale of Total Bond		$1,001 - $15,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ Fidelity NSDQ Composite Index Tracking DESCRIPTION: Purchased shares		$1,001 - $15,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ Fidelity Total Bond Fund DESCRIPTION: Sold shares to buy other funds		$1,001 - $15,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ iSHARES S&P 500 Tracking		$15,001 - $50,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ ONEQ NASDAQ Tracking		$15,001 - $50,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ Vanguard FTSE Social Index		$1,001 - $15,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ Vanguard International Equity Index DESCRIPTION: Purchased shares		$1,001 - $15,000	Tax-Deferred		
Jared's NRDC Defined Benefit Pension ⇒ NRDC Defined Benefit Pension Account		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Jared's Roth IRA ⇒ Alger Green Fund		$1,001 - $15,000	Tax-Deferred		☐
Jared's Roth IRA ⇒ Fidelity Cash Reserves		$1 - $1,000	Tax-Deferred		☐
Jared's Roth IRA ⇒ Fidelity Cash Reserves DESCRIPTION: Withdrawal of principal from ROTH IRA		$1,001 - $15,000	Tax-Deferred		☐
Jared's Roth IRA ⇒ Vanguard FTSE Social Index		$1,001 - $15,000	Tax-Deferred		☐
Nathan Huffman 529 Plan ⇒ Scholarshare Passive Age-Based Portfilio 9-10 DESCRIPTION: Grandparents contribution	DC	$15,001 - $50,000	None		☑
Nathan Huffman child savings account ⇒ Capitol One (formerly ING Direct) CD	DC	$1,001 - $15,000	Interest	$1 - $200	☐
Susan's CalSRTS Retirement ⇒ CalSTRS Pension Account	JT	$15,001 - $50,000	None		☐
Susan's Fidelity Roth IRA ⇒ Domini Social Equity Fund	JT	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Roth IRA ⇒ Fidelity Blue Chip Growth Fund	JT	$1,001 - $15,000	Dividends, Tax-Deferred	$1 - $200	☐
Susan's Fidelity Roth IRA ⇒ Fidelity Cash Reserves DESCRIPTION: Withdrawal of principal from ROTH IRA	JT	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Roth IRA ⇒ Fidelity Dividend Growth Fund	JT	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Roth IRA ⇒ Fidelity Low Priced Stock Fund	JT	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Roth IRA ⇒ Fidelity Small Cap Stock Fund	JT	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Roth IRA ⇒ Microsoft Corporation (MSFT)	JT	$1,001 - $15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Susan's IRA CD Account ⇒ Discover CD	SP	$1,001 - $15,000	Interest, Tax-Deferred	$1 - $200	☐
Susan's TIAA-CREF Retirement Account ⇒ CREF Stock Fund	SP	$15,001 - $50,000	Tax-Deferred		☐
Washington residence LOCATION: Washington, DC, US DESCRIPTION: Part-time residence in Washington, DC	JT	$500,001 - $1,000,000	None		☐

* Asset class details available at the bottom of this form.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Abby Huffman 529 Plan ⇒ Fidelity NH Portfolio 2018 LOCATION: CA DESCRIPTION: grandparents contribution to 529 plan	DC	02/23/2015	P	$1,001 - $15,000	
ADCO Limited partnership units ⇒ Adhesive Coatings Co. Ltd. LOCATION: CA, US DESCRIPTION: Sale of units		03/15/2015	S (partial)	$1,001 - $15,000	☑
Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market DESCRIPTION: sold shares to purchase other funds in this account		09/1/2015	S	$1,001 - $15,000	☐
Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market DESCRIPTION: sold shares to purchase other funds in this account		09/1/2015	S	$1,001 - $15,000	☐
Jared's Fidelity Rollover IRA ⇒ Fidelity NSDQ Composite Index Tracking		09/1/2015	P	$1,001 - $15,000	
Jared's Fidelity Rollover IRA ⇒ iShares Core S&P500		09/1/2015	P	$1,001 - $15,000	
Nathan Huffman 529 Plan ⇒ Scholarshare Passive Age-Based Portfolio 9-1- LOCATION: CA	DC	02/23/2015	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
DESCRIPTION: Grandparents contribution to 529 plan					

* Asset class details available at the bottom of this form.

Schedule C: Earned Income

Source	Type	Amount
Novato Youth Volleyball Assn.	Spouse salary for coaching	N/A
Folger-Garfield House	Spouse income from property rental	$52,450.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Mortgage, Des Moines, IA	October 2012	Mortgage on personal residence	$250,001 - $500,000
JT	BB&T Mortgage, Whiteville, NC	November 2013	Mortgage on part-time residence in Washington	$500,001 - $1,000,000
JT	Bank of America HELOC	September 2014	2nd mortgage/home equity loan on home	$15,001 - $50,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
November 2006	Jared Huffman and former employer Natural Resources Defense Council	Defined benefit pension account, with pension benefit beginning in the year 2029

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?**
Aspen Institute study trip to Panama	02/17/2015	02/22/2015	San Francisco, CA - Panama City, Panama - San Francisco, CA	0	☑	☑	☑

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Asset Class Details

- Abby Huffman 529 Plan (Owner: DC)
  Location: CA
  Description: Daughter's college savings plan
- Abby Huffman Child Savings Account (Owner: DC)
  Location: CA, US
  Description: Daughter's child savings account
- ADCO Limited partnership units
  Location: CA, US
  Description: Jared Huffman's limited partnership unites in Adhesive Coatings Co. (ADCO).
- Bank Accounts (Owner: JT)
  Location: San Rafael, CA, US
  Description: Checking and savings accounts
- Fidelity Joint Brokerage Account (Owner: JT)
  Location: US
- Jared's Fidelity Rollover IRA
  Description: Rollover IRA owned by Jared Huffman
- Jared's Fidelity Traditional IRA
  Description: Traditional IRA owned by Jared Huffman
- Jared's NRDC Defined Benefit Pension
  Description: Defined benefit pension account for work at Natural Resources Defense Council 2001-06.
- Jared's Roth IRA
  Description: Roth IRA owned by Jared Huffman
- Nathan Huffman 529 Plan (Owner: DC)
  Location: CA
  Description: Nathan Huffman college savings plan
- Nathan Huffman child savings account (Owner: DC)
  Location: CA, US
  Description: Son's child savings account
- Susan's CalSRTS Retirement (Owner: JT)
  Description: Susan's California Teachers Retirement Account
- Susan's Fidelity Roth IRA (Owner: JT)
  Description: Roth IRA owned by Susan Huffman
- Susan's IRA CD Account (Owner: SP)
  Description: Discover CD account owned by Susan Huffman

- Susan's TIAA-CREF Retirement Account (Owner: SP)
  Description: TIAA-CREF Teachers Retirement

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. Jared Huffman , 06/15/2016