Filing ID #10041395

Financial Disclosure Report

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Filer Information

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

Filing Information

Filing Type: Amendment Report
Filing Year: 2019
Filing Date: 07/12/2021

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 [MF]	DC	$50,001 - $100,000	None		☐
Abby Huffman Child Savings Account ⇒ Abby's Savings Account [BA] 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 [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	☐
Bank Accounts ⇒ Bank of America Checking [BA]	JT	$1,001 - $15,000	None		☐
Bank Accounts ⇒ Redwood Credit Union - Checking [BA]	JT	$1,001 - $15,000	None		☐
Fidelity Joint Brokerage Account ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF] Description: 10/19/18 Sold $10,045	JT	$15,001 - $50,000	Dividends	$201 - $1,000	☐
Huffman Family Trust ⇒ DC Residence + rental income [RP]	JT	$500,001 - $1,000,000	Rent	$15,001 - $50,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
LOCATION: Washington, DC, US DESCRIPTION: Rent checks from tenants					
Jared's Fidelity Rollover IRA ⇒ Claymore Exchange TR Guggenheim Solar [EF]		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund [MF]		$15,001 - $50,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market [BA]		$15,001 - $50,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF] DESCRIPTION: 9/19/18: Bought $5,000		$50,001 - $100,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ INVESCO ETF Solar - TAN [MF] DESCRIPTION: Sold 594 shares on 6/20/19		$1,001 - $15,000	Tax-Deferred		☑
Jared's Fidelity Rollover IRA ⇒ iShares Europe ETF [EF]		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ MSCI Index Fund - FUTY [MF] DESCRIPTION: 2/7/18 Bought $9474. 00		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Powershares Wilder-Hill Clean Energy ETF [EF]		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF] DESCRIPTION: 1/23/18 Bought $30,075.00; also 9/19/18 Bought $5,075		$50,001 - $100,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Vanguard International Equity Index [EF]		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Traditional IRA ⇒ Fidelity Cash Reserves [BA] DESCRIPTION: Purchase from sale of Total Bond		$1 - $1,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Jared's Fidelity Traditional IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF] DESCRIPTION: Purchased 1,700 shares		$1,001 - $15,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ Fidelity Total Bond Fund [MF]		$1,001 - $15,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [MF] DESCRIPTION: 10/26/18 Bought $745.48		$1 - $1,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ Vanguard FTSE Social Index [MF]		$1,001 - $15,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF] DESCRIPTION: 2/7/18 Bought $10,075.00		$50,001 - $100,000	Tax-Deferred		
Jared's Fidelity Traditional IRA ⇒ Vanguard International Equity Index [EF]		$1,001 - $15,000	Tax-Deferred		
Jared's NRDC Defined Benefit Pension ⇒ NRDC Defined Benefit Pension Account [PE]		$15,001 - $50,000	Tax-Deferred		
Jared's Roth IRA ⇒ Fidelity Cash Reserves [BA]		$1 - $1,000	Tax-Deferred		
Jared's Roth IRA ⇒ Fidelity Cash Reserves [BA] DESCRIPTION: Withdrawal of principal from ROTH IRA		$1 - $1,000	Tax-Deferred		
Jared's Roth IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [MF] DESCRIPTION: Bought $304.83 on 10/26/18		$1 - $1,000	Tax-Deferred		
Jared's Roth IRA ⇒ MSCI Index Fund - FUTY [MF] DESCRIPTION: Bought $4,894 on 2/7/18		$1,001 - $15,000	Tax-Deferred		
Jared's Roth IRA ⇒ Vanguard FTSE Social Index [MF]		$1,001 - $15,000	Tax-Deferred		
Nathan Huffman 529 Plan ⇒ Scholarshare Passive Age-Based Portfilio 9-10 [MF]	DC	$15,001 - $50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
DESCRIPTION: Grandparents contribution					
Nathan Huffman Cal ABLE account ⇒ Cal ABLE Moderate Fund [MF]	DC	$1,001 - $15,000	Tax-Deferred		☑
DESCRIPTION: 7/2/19 $15,000 transferred from 529 Plan to Cal ABLE Account					
Nathan Huffman child savings account ⇒ Capitol One (formerly ING Direct) CD [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	☐
Redwood Credit Union Money Market [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	☐
Susan's CalSRTS Retirement ⇒ CalSTRS Pension Account [PE]	JT	$15,001 - $50,000	None		☐
Susan's Fidelity Rollover IRA ⇒ Fidelity Cash Reserves [BA]	SP	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Rollover IRA ⇒ Fidelity Growth and Income Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Rollover IRA ⇒ Fidelity Intermediate Bond Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Rollover IRA ⇒ Fidelity Small Cap Stock Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Rollover IRA ⇒ Fidelity Total Bond Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Roth IRA ⇒ Domini Social Equity Fund [MF]	JT	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Roth IRA ⇒ Fidelity Blue Chip Growth Fund [MF]	JT	$15,001 - $50,000	Tax-Deferred		☐
DESCRIPTION: balance rose slightly over $15k due to appreciation					
Susan's Fidelity Roth IRA ⇒ Fidelity Cash Reserves [BA]	JT	$1,001 - $15,000	Tax-Deferred		☐
DESCRIPTION: Withdrawal of principal from ROTH IRA					
Susan's Fidelity Roth IRA ⇒ Fidelity Dividend Growth Fund [MF]	JT	$15,001 - $50,000	Tax-Deferred		☐
Susan's Fidelity Roth IRA ⇒	JT	$1,001 - $15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity Low Priced Stock Fund [MF]					
Susan's Fidelity Roth IRA ⇒ Fidelity Small Cap Stock Fund [MF]	JT	$1,001 - $15,000	Tax-Deferred		☐
Susan's Fidelity Roth IRA ⇒ Microsoft Corporation (MSFT) [ST]	JT	$15,001 - $50,000	Tax-Deferred		☐
Susan's TIAA-CREF Retirement Account ⇒ CREF Stock Fund [MF]	SP	$15,001 - $50,000	Tax-Deferred		☐

* Asset class 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?
Jared's Fidelity Rollover IRA ⇒ INVESCO ETF Solar - TAN [MF] Description: Sold 594 shares at $28/share		06/20/2019	S	$15,001 - $50,000	☐
Jared's Fidelity Rollover IRA ⇒ iShares TR Global Clean Energy [MF] Description: Sold all shares		07/5/2019	S	$1,001 - $15,000	☐
Nathan Huffman 529 Plan ⇒ Scholarshare Passive Age-Based Portfolio 9-10 [MF] Description: Transfer funds into new Cal ABLE Account	DC	07/2/2019	S	$1,001 - $15,000	☐
Nathan Huffman Cal ABLE account ⇒ Cal ABLE Moderate Fund [MF] Description: Transfer from 529 Plan	DC	07/2/2019	P	$1,001 - $15,000	
Nathan Huffman Cal ABLE account ⇒ Cal ABLE Moderate Fund [MF] Description: $3,320 payment for music therapy sessions	DC	07/15/2019	S	$1,001 - $15,000	☐

* Asset class 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
Larkspur-Corte Madera School District	Spouse salary	N/A
College of Marin Volleyball Camp	Spouse coaching income	N/A
DFC Advisory Services	Spouse income	N/A

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	Citibank	November 2013	Mortgage on part-time residence in Washington	$500,001 - $1,000,000

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

None disclosed.

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

- Bank Accounts (Owner: JT)
  Location: San Rafael, CA, US
  Description: Checking and savings accounts
- Fidelity Joint Brokerage Account (Owner: JT)
  Location: US
- Huffman Family Trust (Owner: JT)
  Description: Living Trust for purposes of personal residence
- 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, US
  Description: Nathan Huffman college savings plan
- Nathan Huffman Cal ABLE account (Owner: DC)
  Location: US
- 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 Rollover IRA (Owner: SP)
- Susan's Fidelity Roth IRA (Owner: JT)
  Description: Roth IRA 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 , 07/12/2021