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: 2020
Filing Date: 07/15/2021

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 ⇒ Redwood Credit Union - Checking [BA]	JT	$1,001 - $15,000	None		☐
Fidelity Joint Brokerage Account ⇒ Fidelity Govt Money Market [BA] Description: CORE account/cash	JT	$15,001 - $50,000	Dividends	$201 - $1,000	☐
Fidelity Joint Brokerage Account ⇒ SPDR S&P 500 ETF [EF] Description: Bought and sold shares	JT	None	Capital Gains	$201 - $1,000	☑
Fidelity Joint Brokerage Account ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]	JT	None	Dividends	$201 - $1,000	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Description: Sold all shares in March 2020					
Huffman Family Trust ⇒ DC Residence + rental income [RP] Location: Washington, DC, US Description: Rent checks from tenants	JT	$500,001 - $1,000,000	Rent	$15,001 - $50,000	☐
Jared's Fidelity Rollover IRA ⇒ ALPS Clean Energy [EF] Description: Purchased shares		$15,001 - $50,000	Tax-Deferred		☑
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund [MF] Description: Sold shares		None	Tax-Deferred		☑
Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market [BA] Description: CORE account/cash		$50,001 - $100,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF] Description: Sold shares		None	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 Wilder-Hill Clean Energy ETF [EF]		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ iShares Europe ETF [EF] Description: Sold shares		None	Tax-Deferred		☑
Jared's Fidelity Rollover IRA ⇒ MSCI Index Fund - FUTY [MF]		$15,001 - $50,000	Tax-Deferred		☐
Jared's Fidelity Rollover IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF] Description: Sold shares		None	Tax-Deferred		☑
Jared's Fidelity Rollover IRA ⇒ Vanguard International Equity Index [EF] Description: Sold shares		None	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Jared's Fidelity Traditional IRA ⇒ Fidelity Cash Reserves [BA] DESCRIPTION: cash account		$50,001 - $100,000	Tax-Deferred		☐
Jared's Fidelity Traditional IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF] DESCRIPTION: Sold shares		None	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]		$1,001 - $15,000	Tax-Deferred		☐
Jared's Fidelity Traditional IRA ⇒ Vanguard FTSE Social Index [MF] DESCRIPTION: purchase shares		$15,001 - $50,000	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: Sold shares		None	Tax-Deferred		☑
Jared's Fidelity Traditional IRA ⇒ Vanguard International Equity Index [EF] DESCRIPTION: Sold shares		None	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 ⇒ First TR NSDQ Clean Edge Green Energy Index [MF] DESCRIPTION: Bought $304.83 on 10/26/18		$1,001 - $15,000	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 ⇒		$1,001 - $15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Vanguard FTSE Social Index [MF]					
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] DESCRIPTION: 11/20/2020 rolled over $15,000 to Cal ABLE account, leaving balance of $4,377	DC	$1,001 - $15,000	None		☑
Nathan Huffman Cal ABLE account ⇒ Cal ABLE Moderate Fund [MF] DESCRIPTION: $15,000 transferred from 529 Account on 11/20/2020	DC	$15,001 - $50,000	Tax-Deferred		☑
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	$50,001 - $100,000	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] DESCRIPTION: Proceeds from sale of funds	SP	$15,001 - $50,000	Tax-Deferred		☐
Susan's Fidelity Rollover IRA ⇒ Fidelity Growth and Income Fund [MF] DESCRIPTION: Sold shares on 4/14/20	SP	None	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] DESCRIPTION: Sold shares on 4/14/20	SP	None	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	None	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Description: Sold shares					
Susan's Fidelity Roth IRA ⇒ Fidelity Cash Reserves [BA] Description: Proceeds from sale of mutual funds	JT	$15,001 - $50,000	Tax-Deferred		☐
Susan's Fidelity Roth IRA ⇒ Fidelity Dividend Growth Fund [MF] Description: Sold shares	JT	None	Tax-Deferred		☑
Susan's Fidelity Roth IRA ⇒ Fidelity Low Priced Stock Fund [MF] Description: Sold shares	JT	None	Tax-Deferred		☑
Susan's Fidelity Roth IRA ⇒ Fidelity Small Cap Stock Fund [MF] Description: Sold shares	JT	None	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	$50,001 - $100,000	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?
Fidelity Joint Brokerage Account ⇒ SPDR S&P 500 ETF [EF]	JT	03/12/2020	P	$1,001 - $15,000	
Fidelity Joint Brokerage Account ⇒ SPDR S&P 500 ETF [EF]	JT	05/19/2020	S	$1,001 - $15,000	☑
Fidelity Joint Brokerage Account ⇒ Vanguard Intermediate Bond Fund - VFSTX [BA] Description: Sold shares	JT	03/13/2020	S	$1,001 - $15,000	☐
Fidelity Joint Brokerage Account ⇒ Vanguard Intermediate Bond Fund - VFSTX [BA]	JT	03/20/2020	S	$15,001 - $50,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Jared's Fidelity Rollover IRA ⇒ ALPS Clean Energy [MF]		03/19/2020	P	$1,001 - $15,000	
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund [MF]		04/16/2020	S	$1,001 - $15,000	☐
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund [MF]		04/9/2020	S	$1,001 - $15,000	☐
Jared's Fidelity Rollover IRA ⇒ Fidelity Limited Term Bond Fund [MF]		03/20/2020	S	$15,001 - $50,000	☐
Jared's Fidelity Rollover IRA ⇒ Fidelity Limited Term Bond Fund [MF]		03/24/2020	S	$15,001 - $50,000	☐
Jared's Fidelity Rollover IRA ⇒ iShares Europe ETF [MF]		04/17/2020	S	$1,001 - $15,000	☐
Jared's Fidelity Rollover IRA ⇒ MSCI Index Fund - FUTY [MF]		03/25/2020	P	$1,001 - $15,000	
Jared's Fidelity Rollover IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]		03/20/2020	S	$15,001 - $50,000	☐
Jared's Fidelity Rollover IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]		03/24/2020	S	$50,001 - $100,000	☐
Jared's Fidelity Rollover IRA ⇒ Vanguard International Equity Index Fund [MF]		04/9/2020	S	$1,001 - $15,000	☐
Jared's Fidelity Traditional IRA ⇒ Fidelity Limited Term Bond Fund [MF]		03/23/2020	S	$1,001 - $15,000	☐
Jared's Fidelity Traditional IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF]		03/19/2020	S	$15,001 - $50,000	☐
Jared's Fidelity Traditional IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]		03/19/2020	S	$50,001 - $100,000	☐
Jared's Fidelity Traditional IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]		03/23/2020	S	$15,001 - $50,000	☐
Jared's Fidelity Traditional IRA ⇒ Vanguard International Equity Index Fund [MF]		04/17/2020	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Nathan Huffman 529 Plan ⇒ Nathan Huffman 529 Account [MF] DESCRIPTION: Transfer $15,000 to Cal ABLE account leaving balance of less than $5k	DC	11/20/2020	S (partial)	$1,001 - $15,000	☐
Nathan Huffman Cal ABLE account ⇒ Nathan Huffman Cal ABLE account [MF] DESCRIPTION: Transfer from Nathan's 529 Account	DC	11/20/2020	P	$1,001 - $15,000	
Susan's Fidelity Rollover IRA ⇒ Fidelity Growth and Income Fund [MF] DESCRIPTION: Sold all shares	SP	04/14/2020	S	$1,001 - $15,000	☐
Susan's Fidelity Rollover IRA ⇒ Fidelity Small Cap Stock Fund [MF] DESCRIPTION: Sold all shares	SP	04/14/2020	S	$1,001 - $15,000	☐
Susan's Fidelity Roth IRA ⇒ Fidelity Blue Chip Growth Fund [MF] DESCRIPTION: Sold all shares	JT	04/14/2020	S	$15,001 - $50,000	☐
Susan's Fidelity Roth IRA ⇒ Fidelity Dividend Growth Fund [MF] DESCRIPTION: Sold all shares	JT	04/14/2020	S	$15,001 - $50,000	☐
Susan's Fidelity Roth IRA ⇒ Fidelity Low Price Stock Fund [MF] DESCRIPTION: Sold all shares	JT	04/14/2020	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
In Home Support Services wages	Spouse income	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Flagstar Bank	August 2020	Mortgage on personal residence	$250,001 - $500,000
JT	Citizens Bank	April 2020	Mortgage on part time home in Washington DC	$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 , 07/15/2021