



# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Kermit Jones  
**Status:** Congressional Candidate  
**State/District:** CA04

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 11/16/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 Account 1 [5P] LOCATION: CA	DC	\$15,001 - \$50,000	Tax-Deferred		
529 Account 2 [5P] LOCATION: CA	DC	\$1,001 - \$15,000	Tax-Deferred		
Amazon.com, Inc. (AMZN) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		
Deferred Salary [OT] DESCRIPTION: Retirement Plan	JT	\$100,001 - \$250,000	Tax-Deferred		
Fidelity Roth IRA [IH]	SP	\$100,001 - \$250,000	Tax-Deferred		
Invesco QQQ Trust, Series 1 (QQQ) [ST]		\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	None
Lucid Group Stock Option [OP] DESCRIPTION: Lucid Group Stock Option		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Permanente Retirement Plan [PE]		\$50,001 - \$100,000	Capital Gains	None	None
Roth IRA [IH]		\$50,001 - \$100,000	Tax-Deferred		
Tesla Stock Option [OP] DESCRIPTION: Option for Tesla Stock		\$15,001 - \$50,000	Interest	\$15,001 - \$50,000	None
Tesla, Inc. (TSLA) [ST]		\$15,001 - \$50,000	Capital Gains	None	\$5,001 - \$15,000
Vanguard [EF]	JT	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500

\* 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 Current Year to Filing	Amount Preceding Year
The Permanente Medical Group	Salary	\$230,535.00	\$235,468.00
Sutter Medical Group	Spouse Salary	N/A	N/A
Rush Medical Center	Honorarium	\$500.00	N/A
Heidari Law Group	Consulting Fee	\$3,484.00	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Rocket Mortgage	September 2020	Mortgage	\$250,001 - \$500,000
	The Permanente Medical Group	February 2019	Mortgage	\$50,001 - \$100,000
	Benefit Financial Credit Union	August 2021	Personal Loan	\$15,001 - \$50,000
	US Dept. of Education	August 2005	Student Loan	\$15,001 - \$50,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Advisory Board Member	Stop the Spread

### **SCHEDULE F: AGREEMENTS**

None disclosed.

### **SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

### **EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**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:** Kermit Jones , 11/16/2021