



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: CA03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 05/17/2022
Period Covered: 01/01/2021– 05/16/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 College Savings Plan ⇒ Aggressive Growth Portfolio [5P] LOCATION: CA		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
529 College Savings Plan ⇒ High Yield Bond Portfolio [5P] LOCATION: CA		\$1 - \$1,000	Capital Gains, Dividends	None	None
529 College Savings Plan ⇒ Income Portfolio [5P] LOCATION: CA		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
529 College Savings Plan ⇒ Inflation-Protected Securities [5P] LOCATION: CA		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
529 College Savings Plan ⇒ Small-Cap Index [5P] LOCATION: CA		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
529 College Savings Plan ⇒ Target Enrollment 2036/2037 [5P]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: CA					
Book Inc [FA]		\$15,001 - \$50,000	None		
LOCATION: South Haven/Van Buren County, MI, US					
DESCRIPTION: S-corp that owns the revenue streams from our family farm					
E-Trade Savings Account [BA]	JT	\$50,001 - \$100,000	None		
Fidelity Roth IRA ⇒ Fidelity Roth IRA [IH]		\$1,001 - \$15,000	Capital Gains	None	\$2,501 - \$5,000
Fidelity Roth IRA ⇒ Gold ETF [EF]		\$1,001 - \$15,000	Capital Gains	None	None
Fidelity Roth IRA ⇒ QQQ [IH]		\$1 - \$1,000	Capital Gains	None	None
Fidelity Roth IRA ⇒ Tesla, Inc. (TSLA) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Permanente Retirement Plan 401K ⇒ Permanente Retirement Plan 401k [OT]		\$100,001 - \$250,000	Capital Gains	None	\$15,001 - \$50,000
DESCRIPTION: Employer sponsored 401(k) account					
Rivian Automotive, Inc. - Class A (RIVN) [ST]		\$50,001 - \$100,000	Capital Gains	None	None
Tesla, Inc. (TSLA) [ST]		\$50,001 - \$100,000	Capital Gains	None	\$5,001 - \$15,000
Thrift Savings Plan (TSP) ⇒ C Fund Common Stock Index [GS]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Thrift Savings Plan (TSP) ⇒ F Fund Fixed Income Index [GS]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Thrift Savings Plan (TSP) ⇒ G Fund Government Securities [GS]		\$15,001 - \$50,000	Capital Gains, Dividends	None	None
Thrift Savings Plan (TSP) ⇒ I Fund International Stock Index [GS]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Thrift Savings Plan (TSP) ⇒ S Fund Small Cap Stock Index [GS]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Thrift Savings Plan (TSP) ⇒ TSP Account [GS]		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
Vanguard Roth IRA ⇒ AMZN [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Roth IRA ⇒ Money Market Fund [IH]		\$1,001 - \$15,000	Interest	None	None
Vanguard Roth IRA ⇒ Total Bond MKT ETF [IH]		\$1 - \$1,000	Capital Gains, Dividends	None	None
Vanguard Roth IRA ⇒ Total Intl Stock ETF [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Roth IRA ⇒ Total Stock MKT ETF [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Roth IRA ⇒ Vanguard Roth IRA [IH]		\$50,001 - \$100,000	Capital Gains, Dividends, Interest	None	\$50,001 - \$100,000
Vanguard Roth IRA ⇒ VBTLX Total Bond Admiral [IH]		\$15,001 - \$50,000	Capital Gains, Dividends	None	None
Vanguard Roth IRA ⇒ VFIAX Admiral Shares [IH]		\$15,001 - \$50,000	Capital Gains, Dividends	None	None
Vanguard Roth IRA ⇒ VGPMX Global Capital Fund [IH]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Roth IRA ⇒ VGSLX Real Estate Fund [IH]		\$15,001 - \$50,000	Capital Gains, Dividends	None	None
Vanguard Roth IRA ⇒ VTHR Retirement 2030 [IH]		\$1,001 - \$15,000	Interest	None	None
Wells Fargo - Checking Account [BA]	JT	\$1,001 - \$15,000	None		

* 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 Current Year to Filing	Amount Preceding Year
Permanente Medical Group	Salary	\$50,000.00	\$200,000.00
Sutter Medical Group	Spouse salary	N/A	N/A
Rush Medical Center	Honorarium	N/A	\$500.00
Heidari Law Group	Salary	N/A	\$3,484.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Rocket Mortgage	9/2020	Mortgage	\$250,001 - \$500,000
JT	The Permanente Medical Group	2/2019	Mortgage	\$50,001 - \$100,000
	Benefit Financial Credit Union	8/21	Loan	\$15,001 - \$50,000
	Department of Education	8/05	Student loans	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Physician	Kaiser Permanente (The Permanente Medical Group)
Post Surgeon	Veterans of Foreign Wars

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- o 529 College Savings Plan
LOCATION: CA
- o Fidelity Roth IRA

- Permanent Retirement Plan 401K
- Thrift Savings Plan (TSP)
LOCATION: CA, US
DESCRIPTION: The Thrift Savings Plan (TSP) is a tax-deferred retirement savings and investment plan that offers Federal employees the same type of savings and tax benefits that many private corporations offer their employees under 401(k) plans.
- Vanguard Roth IRA

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 , 05/17/2022