



Filing ID #10060152

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 06/10/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank Accounts ⇒ Redwood Credit Union - Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Citibank CD [BA] DESCRIPTION: Put \$2k in CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Fidelity Govt Money Market [BA] DESCRIPTION: CORE account/cash	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Fidelity Short Term Bond Fund [MF] DESCRIPTION: Purchased shares	JT	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ First Horizon Bank CD [BA] DESCRIPTION: Put \$4k in CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Manufacturers & Traders Co CD [BA] DESCRIPTION: Put \$2k in CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Joint Brokerage Account ⇒ Santander Bank CD [BA] DESCRIPTION: Put \$2k in CD	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ SPDR S&P 500 ETF [EF] DESCRIPTION: Purchased shares	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Western Alliance Bank CD [BA] DESCRIPTION: Purchased and Redeemed CD	JT	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
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	<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ ALPS Clean Energy [EF] DESCRIPTION: Purchased shares		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ American Bond Fund [MF] DESCRIPTION: Purchased shares		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Baird Aggregate Bond Fund [MF] DESCRIPTION: Purchased shares		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Customers Bank CD [BA] DESCRIPTION: Put \$8,000 in CD.		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market [BA] DESCRIPTION: CORE account/cash		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Fidelity Short Term Bond Fund [MF] DESCRIPTION: Purchased shares		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF] DESCRIPTION: bought shares		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Jared's Fidelity Rollover IRA ⇒ Global X FDS Robotics - BOTZ [EF] DESCRIPTION: bought shares		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF] DESCRIPTION: bought shares		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF] DESCRIPTION: bought shares		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Merchant's Bank CD [BA] DESCRIPTION: Put \$8k in CD		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ MSCI Index Fund - FUTY [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Signature Bank CD [BA] DESCRIPTION: Put \$8k in CD		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Sinovus Bank CD [BA] DESCRIPTION: Put \$8k in CD		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ SPDR S&P 500 ETF [MF] DESCRIPTION: Purchased shares		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Fidelity Cash Reserves [BA] DESCRIPTION: cash account		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Fidelity Total Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Invesco FD TR II Solar ETF [EF] DESCRIPTION: Bought shares		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Jared's Fidelity Traditional IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF] DESCRIPTION: bought shares		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ SPDR S&P 500 ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Vanguard FTSE Social Index [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Roth IRA ⇒ Fidelity Cash Reserves [BA]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
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		<input type="checkbox"/>
Jared's Roth IRA ⇒ MSCI Index Fund - FUTY [MF] DESCRIPTION: Bought \$4,894 on 2/7/18		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Roth IRA ⇒ Vanguard FTSE Social Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Redwood Credit Union Money Market [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Susan's CalSRTS Retirement ⇒ CalSTRS Pension Account [PE] DESCRIPTION: Spouse teaching pension	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Susan's Fidelity IRA-BDA ⇒ Invesco FD TR II Solar ETF [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Susan's Fidelity Rollover IRA ⇒ Fidelity Intermediate Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Rollover IRA ⇒ Fidelity Total Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF] DESCRIPTION: bought shares	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Domini Social Equity Fund [MF]					
Susan's Fidelity Roth IRA ⇒ Fidelity Cash Reserves [BA]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Proceeds from sale of mutual funds					
Susan's Fidelity Roth IRA ⇒ Invesco FD TR II Solar ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: bought shares					
Susan's Fidelity Roth IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: bought shares					
Susan's Fidelity Roth IRA ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ SPDR S&P 500 ETF [EF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase shares					
Susan's TIAA-CREF Retirement Account ⇒ CREF Stock Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
US Treasury Direct Bond Account [GS]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchased in 2022					
US Treasury Direct Bond Account [GS]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchased in 2022 - \$10k for each spouse					

* Investment vehicle 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 ⇒ Citibank CD [BA]	JT	12/5/2023	P	\$1,001 - \$15,000	
DESCRIPTION: Purchase CD					
Fidelity Joint Brokerage Account ⇒ First Horizon Bank CD [BA]	JT	08/31/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Redeemed CD					
Fidelity Joint Brokerage Account ⇒ First Horizon Bank CD [BA]	JT	12/1/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Redeemed CD					
Fidelity Joint Brokerage Account ⇒ First Horizon Bank CD [BA]	JT	05/31/2023	P	\$1,001 - \$15,000	
DESCRIPTION: Put \$4k in CD					
Fidelity Joint Brokerage Account ⇒ Manufacturers & Traders Co CD [BA]	JT	05/31/2023	P	\$1,001 - \$15,000	
DESCRIPTION: Put \$2k in CD					
Fidelity Joint Brokerage Account ⇒ Santander Bank CD [BA]	JT	05/26/2023	P	\$1,001 - \$15,000	
DESCRIPTION: Put \$2k in CD					
Fidelity Joint Brokerage Account ⇒ Western Alliance Bank CD [BA]	JT	10/2/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: Redeemed CD					
Jared's Fidelity Rollover IRA ⇒ Customers Bank CD [BA]		01/13/2023	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Merchant's Bank CD [BA]		01/13/2023	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Merchant's Bank CD [BA]		07/17/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Redeemed CD					
Jared's Fidelity Rollover IRA ⇒ Signature Bank CD [BA]		01/13/2023	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Sinovus Bank CD [BA]		01/13/2023	P	\$1,001 - \$15,000	

* Investment vehicle 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
In Home Support Services wages	Spouse work	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Nationstar Bank dba Mr. Cooper	September 2021	Mortgage on personal residence	\$100,001 - \$250,000
JT	ServBank (Mortgage Servicer for Money Source)	September 2021	Mortgage on part time home in Washington DC	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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 INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">◦ 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 Roth IRA DESCRIPTION: Roth IRA owned by Jared Huffman

- Susan's CalSRTS Retirement (Owner: SP)
DESCRIPTION: Susan's California Teachers Retirement Account
- Susan's Fidelity IRA-BDA (Owner: SP)
- Susan's Fidelity Rollover IRA (Owner: SP)
- Susan's Fidelity Roth IRA (Owner: SP)
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 , 06/10/2024