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FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Zoe Lofgren
Status: Member
State/District: CA18

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2023
Filing Date: 08/10/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
California Public Employee Retirement System [DB]		Undetermined	None		☐
City National Bank [BA]	JT	\$1,001 - \$15,000	None		☐
Deskworks Inc. [PS] DESCRIPTION: Software company	SP	\$100,001 - \$250,000	Capital Gains	\$100,001 - \$1,000,000	☒
John Marshall Collins PC, 100% Interest [OL] LOCATION: San Jose, CA, US DESCRIPTION: Law firm.	SP	\$50,001 - \$100,000	None		☐
Residential Rental Property [RP] LOCATION: San Jose, CA, US	JT	\$1,000,001 - \$5,000,000	Rent	\$2,501 - \$5,000	☐
Satellite Telework Centers [PS] DESCRIPTION: Operates co-working space; Felton, CA	SP	\$1 - \$1,000	None		☐
Silicon Valley Bank [BA]	JT	\$50,001 - \$100,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Collins/Lofgren Family Trust ⇒ California State Public Works Board Lease Revenue Bonds, Ser. D [GS]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	☐
Collins/Lofgren Family Trust ⇒ Cash Sweep [BA]	JT	None	Interest	\$201 - \$1,000	☐
Collins/Lofgren Family Trust ⇒ Deckers Outdoor Corporation (DECK) [ST]	JT	None	Capital Gains	\$5,001 - \$15,000	☒
Collins/Lofgren Family Trust ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]	JT	\$15,001 - \$50,000	None		☒
Collins/Lofgren Family Trust ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]	JT	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	☐
Collins/Lofgren Family Trust ⇒ FlexShares Global Upstream Natural Resources Index Fund ETF (GUNR) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Collins/Lofgren Family Trust ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Collins/Lofgren Family Trust ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Collins/Lofgren Family Trust ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Collins/Lofgren Family Trust ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Collins/Lofgren Family Trust ⇒ iShares Trust iShares Global REIT ETF (REET) [EF]	JT	\$1,001 - \$15,000	None		☒
Collins/Lofgren Family Trust ⇒ Lynwood Unified School District GO Bonds [GS]	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	☐
Collins/Lofgren Family Trust ⇒ ProShares DJ Brookfield Global Infrastructure ETF (TOLZ) [EF]	JT	\$1,001 - \$15,000	None		☒
Collins/Lofgren Family Trust ⇒ Southern Company (SO) [ST]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Collins/Lofgren Family Trust ⇒ SPDR Nuveen Bloomberg High Yield Municipal Bond ETF (HYMB) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Collins/Lofgren Family Trust ⇒ TCW Transform 500 ETF (VOTE) [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☒
Collins/Lofgren Family Trust ⇒ United State Treasury Bills [GS]	JT	\$100,001 - \$250,000	None		☒
Collins/Lofgren Family Trust ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Fidelity 457 Deferred Compensation ⇒ American Funds Europac Growth R6 [MF]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity 457 Deferred Compensation ⇒ Fidelity Contrafund [MF]		\$100,001 - \$250,000	Tax-Deferred		☐
Fidelity 457 Deferred Compensation ⇒ MissionSquare PLUS R13 Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		☐
Fidelity 457 Deferred Compensation ⇒ Vanguard Extended Market Index [MF]		\$100,001 - \$250,000	Tax-Deferred		☐
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index [MF]		\$50,001 - \$100,000	Tax-Deferred		☐
John Marshall Collins Rollover IRA ⇒ Anheuser-Busch Inbev SA Sponsored ADR (BUD) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ Aon plc Class A Ordinary Shares (AON) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ Bank of America Corp. MTN [CS] DESCRIPTION: Corporate Bond	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒	SP	None	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cintas Corporation (CTAS) [ST]					
John Marshall Collins Rollover IRA ⇒ Cisco Systems Inc. Noncallable [CS]	SP	None	Tax-Deferred		☒
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Citizens Financial Group, Inc. (CFG) [ST]	SP	None	Tax-Deferred		☐
John Marshall Collins Rollover IRA ⇒ Coca-Cola Company (KO) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ Costco Wholesale Corporation (COST) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
John Marshall Collins Rollover IRA ⇒ FlexShares Global Upstream Natural Resources Index Fund ETF (GUNR) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ General Mills, Inc. (GIS) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ Gilead Sciences, Inc. (GILD) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ HCA Healthcare, Inc. (HCA) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ iShares iBoxx \$ High Yield Corporate Bond ETF (HYG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
John Marshall Collins Rollover IRA ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ iShares Trust iShares Global REIT ETF (REET) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ KeyCorp (KEY) [ST]	SP	None	Tax-Deferred		☐
John Marshall Collins Rollover IRA ⇒ Mastercard Incorporated (MA) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ McDonald's Corporation (MCD) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ Oracle Corp. [CS]	SP	None	Tax-Deferred		☒
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Pepsico, Inc. (PEP) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ ProShares DJ Brookfield Global Infrastructure ETF (TOLZ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ Quanta Services, Inc. (PWR) [ST]	SP	None	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	SP	None	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
John Marshall Collins Rollover IRA ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ Vodafone Group PLC [CS] DESCRIPTION: Corporate bond	SP	None	Tax-Deferred		☐
Zoe Lofgren Trad IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒
Zoe Lofgren Trad IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒
Zoe Lofgren Trad IRA ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒
Zoe Lofgren Trad IRA ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		\$1 - \$1,000	Tax-Deferred		☒
Zoe Lofgren Trad IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒

* 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?
Deskworks Inc. [PS] LOCATION: Sunnyvale, CA, US DESCRIPTION: Software company	SP	03/11/2023	S (partial)	\$100,001 - \$250,000	☒
Collins/Lofgren Family Trust ⇒ Deckers Outdoor Corporation (DECK) [ST]	JT	05/25/2023	S	\$1,001 - \$15,000	☒
Collins/Lofgren Family Trust ⇒ Lucid Group, Inc. (LCID) [ST]	JT	05/25/2023	S	\$1,001 - \$15,000	☐
Collins/Lofgren Family Trust ⇒	JT	05/25/2023	S	\$15,001 - \$50,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Southern Company (SO) [ST]					☐
John Marshall Collins Rollover IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Adobe Inc. (ADBE) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ American Electric Power Company, Inc. (AEP) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ American Water Works Company, Inc. (AWK) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Anheuser-Busch Inbev SA Sponsored ADR (BUD) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Aon plc Class A Ordinary Shares (AON) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Ares Capital Corporation - Closed End Fund (ARCC) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ AT&T Inc. (T) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Avangrid, Inc. (AGR) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Bank of America Corporation (BAC) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ BCE, Inc. (BCE) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Becton, Dickinson and Company (BDX) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
John Marshall Collins Rollover IRA ⇒ Blackstone Inc. (BX) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Cincinnati Financial Corporation (CINF) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Cintas Corporation (CTAS) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Cisco Systems, Inc. (CSCO) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ CME Group Inc. - Class A (CME) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Coca-Cola Company (KO) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Comcast Corporation - Class A (CMCSA) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Costco Wholesale Corporation (COST) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Crown Castle Inc. (CCI) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Danaher Corporation (DHR) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Walt Disney Company (DIS) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Dominion Energy, Inc. (D) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Duke Energy Corporation (DUK) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Edwards Lifesciences Corporation (EW) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
John Marshall Collins Rollover IRA ⇒ Emerson Electric Company (EMR) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Entergy Corporation (ETR) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Equinix, Inc. (EQIX) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Eversource Energy (ES) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Fifth Third Bancorp (FITB) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ First Horizon Corporation (FHN) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ General Mills, Inc. (GIS) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Gilead Sciences, Inc. (GILD) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Hartford Financial Services Group, Inc. (HIG) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ HCA Healthcare, Inc. (HCA) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Interpublic Group of Companies, Inc. (IPG) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ JP Morgan Chase & Co. (JPM) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Mastercard Incorporated (MA) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ McDonald's Corporation (MCD) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒	SP	05/25/2023	S	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merck & Company, Inc. Common Stock (MRK) [ST]					☐
John Marshall Collins Rollover IRA ⇒ MetLife, Inc. (MET) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Mid-America Apartment Communities, Inc. (MAA) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ NextEra Energy, Inc. (NEE) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ NNN REIT, Inc. (NNN) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Old Dominion Freight Line, Inc. (ODFL) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ NXP Semiconductors N.V. (NXPI) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Paychex, Inc. (PAYX) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Pepsico, Inc. (PEP) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Procter & Gamble Company (PG) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ QUALCOMM Incorporated (QCOM) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ ProLogis, Inc. (PLD) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Quanta Services, Inc. (PWR) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Roper Technologies, Inc. (ROP) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ S&P Global Inc. (SPGI) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
John Marshall Collins Rollover IRA ⇒ Sherwin-Williams Company (SHW) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Sonoco Products Company (SON) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
Collins/Lofgren Family Trust ⇒ United States Treasury Bills [GS]	JT	11/07/2023	P	\$100,001 - \$250,000	
Collins/Lofgren Family Trust ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]	JT	05/25/2023	P	\$15,001 - \$50,000	
Collins/Lofgren Family Trust ⇒ TCW Transform 500 ETF (VOTE) [EF]	JT	05/25/2023	P	\$50,001 - \$100,000	
Collins/Lofgren Family Trust ⇒ FlexShares Global Upstream Natural Resources Index Fund ETF (GUNR) [EF]	JT	05/25/2023	P	\$1,001 - \$15,000	
Collins/Lofgren Family Trust ⇒ FlexShares Global Upstream Natural Resources Index Fund ETF (GUNR) [EF]	JT	07/28/2023	P	\$1,001 - \$15,000	
Collins/Lofgren Family Trust ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]	JT	05/25/2023	P	\$15,001 - \$50,000	
Collins/Lofgren Family Trust ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	JT	05/25/2023	P	\$1,001 - \$15,000	
Collins/Lofgren Family Trust ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	JT	05/25/2023	P	\$1,001 - \$15,000	
Collins/Lofgren Family Trust ⇒ iShares Trust iShares Global REIT ETF (REET) [EF]	JT	05/25/2023	P	\$1,001 - \$15,000	
Collins/Lofgren Family Trust ⇒ iShares Trust iShares Global REIT ETF (REET) [EF]	JT	07/28/2023	P	\$1,001 - \$15,000	
Collins/Lofgren Family Trust ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	JT	05/25/2023	P	\$15,001 - \$50,000	
Collins/Lofgren Family Trust ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	JT	07/28/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Collins/Lofgren Family Trust ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	JT	05/30/2023	S (partial)	\$1,001 - \$15,000	☐
Collins/Lofgren Family Trust ⇒ ProShares DJ Brookfield Global Infrastructure ETF (TOLZ) [EF]	JT	05/25/2023	P	\$1,001 - \$15,000	
Collins/Lofgren Family Trust ⇒ ProShares DJ Brookfield Global Infrastructure ETF (TOLZ) [EF]	JT	07/28/2023	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ City National Rochdale Fixed Income Opportunities Fund Class N (RIMOX) [MF]	SP	05/24/2023	S	\$100,001 - \$250,000	☐
John Marshall Collins Rollover IRA ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]	SP	05/24/2023	P	\$50,001 - \$100,000	
John Marshall Collins Rollover IRA ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]	SP	07/24/2023	S (partial)	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	05/25/2023	P	\$100,001 - \$250,000	
John Marshall Collins Rollover IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	07/25/2023	S (partial)	\$15,001 - \$50,000	☐
John Marshall Collins Rollover IRA ⇒ FlexShares Global Upstream Natural Resources Index Fund ETF (GUNR) [EF]	SP	05/25/2023	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	05/25/2023	P	\$15,001 - \$50,000	
John Marshall Collins Rollover IRA ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]	SP	05/25/2023	P	\$50,001 - \$100,000	
John Marshall Collins Rollover IRA ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	SP	05/25/2023	P	\$15,001 - \$50,000	
John Marshall Collins Rollover IRA ⇒ iShares Trust iShares Global REIT ETF (REET) [EF]	SP	05/25/2023	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
John Marshall Collins Rollover IRA ⇒ iShares Russell 2000 ETF (IWM) [EF]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	SP	05/25/2023	P	\$50,001 - \$100,000	
John Marshall Collins Rollover IRA ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	SP	05/30/2023	S (partial)	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	SP	05/31/2023	S (partial)	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ iShares iBoxx \$ High Yield Corporate Bond ETF (HYG) [EF]	SP	05/25/2023	P	\$15,001 - \$50,000	
John Marshall Collins Rollover IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]	SP	05/25/2023	P	\$100,001 - \$250,000	
John Marshall Collins Rollover IRA ⇒ ProShares DJ Brookfield Global Infrastructure ETF (TOLZ) [EF]	SP	05/25/2023	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ SPDR S&P Dividend ETF (SDY) [EF]	SP	05/25/2023	S	\$15,001 - \$50,000	☐
John Marshall Collins Rollover IRA ⇒ Vanguard Global ex-U.S. Real Estate ETF (VNQI) [EF]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Vanguard Real Estate ETF (VNQ) [EF]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	SP	05/25/2023	P	\$15,001 - \$50,000	
John Marshall Collins Rollover IRA ⇒ Starbucks Corporation (SBUX) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ TJX Companies, Inc. (TJX) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ T-Mobile US, Inc. (TMUS) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
John Marshall Collins Rollover IRA ⇒ Thermo Fisher Scientific Inc (TMO) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Trane Technologies plc (TT) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ TransUnion (TRU) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Verizon Communications Inc. (VZ) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Visa Inc. (V) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]	SP	05/25/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ AbbVie Inc. (ABBV) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ American Electric Power Company, Inc. (AEP) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Amazon.com, Inc. (AMZN) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ American Tower Corporation (REIT) (AMT) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Anheuser-Busch Inbev SA Sponsored ADR (Belgium) (BUD) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒	SP	05/26/2023	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Applied Materials, Inc. (AMAT) [CS] DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ Bank of America Corporation (BAC) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$15,001 - \$50,000	☒
John Marshall Collins Rollover IRA ⇒ Bank Of Montreal (BMO) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Caterpillar, Inc. (CAT) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Cisco Systems, Inc. (CSCO) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☒
John Marshall Collins Rollover IRA ⇒ Citigroup, Inc. (C) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ CVS Health Corporation (CVS) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Jefferies Financial Group Inc. (JEF) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ KLA Corporation (KLAC) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ Morgan Stanley (MS) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ NetApp, Inc. (NTAP) [CS] DESCRIPTION: Corporate bond	SP	05/26/2023	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒	SP	05/26/2023	S	\$15,001 - \$50,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Oracle Corporation Ordinary Shares (OCLCF) [CS]					☐
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ Paramount Global Ltd. [CS]	SP	05/26/2023	S	\$1,001 - \$15,000	☐
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ Pfizer, Inc. (PFE) [CS]	SP	05/26/2023	S	\$1,001 - \$15,000	☐
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ Union Pacific Corporation (UNP) [CS]	SP	05/26/2023	S	\$15,001 - \$50,000	☐
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ UnitedHealth Group Incorporated Common Stock (DE) (UNH) [CS]	SP	05/26/2023	S	\$1,001 - \$15,000	☐
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ U.S. Bancorp (USB) [CS]	SP	05/26/2023	S	\$1,001 - \$15,000	☐
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ Verizon Communications Inc. (VZ) [CS]	SP	05/26/2023	S	\$1,001 - \$15,000	☐
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ Walgreens Boots Alliance, Inc. (WBA) [CS]	SP	05/26/2023	S	\$1,001 - \$15,000	☐
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ Wells Fargo & Company (WFC) [CS]	SP	05/26/2023	S	\$1,001 - \$15,000	☐
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ Westpac Banking Corporation (WBK) [CS]	SP	05/26/2023	S	\$1,001 - \$15,000	☐
DESCRIPTION: Corporate bond					
Collins/Lofgren Family Trust ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	JT	05/25/2023	P	\$1,001 - \$15,000	
Collins/Lofgren Family Trust ⇒	JT	05/25/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SPDR Nuveen Bloomberg High Yield Municipal Bond ETF (HYMB) [EF]					
Fidelity 457 Deferred Compensation ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]		12/05/2023	S (partial)	\$1,001 - \$15,000	☐
Fidelity 457 Deferred Compensation ⇒ Fidelity Contrafund K6 (FLCNX) [MF]		12/05/2023	S (partial)	\$1,001 - \$15,000	☐
Fidelity 457 Deferred Compensation ⇒ MissionSquare PLUS R13 Fund [OT]		12/05/2023	S (partial)	\$1,001 - \$15,000	☐
LOCATION: US DESCRIPTION: Mutual fund					
Fidelity 457 Deferred Compensation ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX) [MF]		12/05/2023	S (partial)	\$1,001 - \$15,000	☐
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIIIX) [MF]		12/05/2023	S (partial)	\$1,001 - \$15,000	☐
Fidelity 457 Deferred Compensation ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]		12/14/2023	P	\$1,001 - \$15,000	
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIIIX) [MF]		12/27/2023	P	\$1,001 - \$15,000	
Zoe Lofgren Trad IRA ⇒ Delaware Pooled Trust Diversified Income Fund Class A (DPDFX) [MF]		05/24/2023	S	\$1,001 - \$15,000	☐
Zoe Lofgren Trad IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]		05/25/2023	P	\$1,001 - \$15,000	
Zoe Lofgren Trad IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		05/25/2023	P	\$1,001 - \$15,000	
Zoe Lofgren Trad IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]		05/25/2023	P	\$1,001 - \$15,000	
Zoe Lofgren Trad IRA ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]		05/25/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Zoe Lofgren Trad IRA ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]		05/25/2023	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
Zoe Lofgren Trad IRA	distribution	\$596.00
Fidelity 457 Deferred Compensation	distribution	\$19,379.00
John Marshall Collins PC	spouse salary	N/A
California Public Employee Retirement System	distribution	\$49,516.00
John Marshall Collins Rollover IRA	distribution	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Silicon Valley Bank	January 2022	Mortgage on personal residence, San Jose, CA	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
1981	California Public Employees Retirement System (through County of Santa Clara)	Continuing membership (vested) - no continuing contribution by employer or employee
1981	County of Santa Clara	Continuing membership in 457 plan - no continuing contribution by employer or employee

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Aspen Institute, Inc. and Bill & Melinda Gates Foundation	08/12/2023	08/19/2023	San Francisco, CA - Nairobi, Kenya - San Francisco, CA	0	☒	☒	☒

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Fidelity 457 Deferred Compensation
- Collins/Lofgren Family Trust (Owner: JT)
- Zoe Lofgren Trad IRA
- John Marshall Collins Rollover IRA (Owner: SP)

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. Zoe Lofgren , 08/10/2026