



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Lucia Dora Simonelli
Status: Congressional Candidate
State/District: PA01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 03/11/2026
Period Covered: 01/01/2025– 02/11/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Betterment - Company Level (BETNZXX) [OT]		\$1,001 - \$15,000	Mixed	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Automated investing, climate impact					
Calvert Balanced Fund Class R6 [HE]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Jocelyn 401(k)					
Carbon Collective Climate Solutions U.S. Equity ETF (CCSO) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Carbon Collective Short Duration Green Bond ETF (CCSB) [EF]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Savings account and CDs [BA]		\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: savings account and 2 CDs					
Vanguard Cash Reserves Federal MM Adm [IH]		\$1,001 - \$15,000	Roth IRA	\$201 - \$1,000	\$201 - \$1,000
Vanguard Target Retirement 2055 Inv [HE]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: ID Insight Inc 401(k) Plan					

* 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
IDinsight	salary	\$9,529.23	\$84,300.00
Multiplier	salary	\$128,914.04	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2025	Multiplier	This is my current employer. I was unable to quit my job, so my campaign activity is restricted to outside of working hours. My employment and the campaign are kept separate.

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

Source (Name and Address)	Brief Description of Duties
IDinsight (San Francisco, CA, US)	I was a Senior Researcher.
Multiplier (San Francisco, CA, US)	I am Director of Programs.

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: Lucia Dora Simonelli , 03/11/2026