



Filing ID #10074949

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
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		☐
Deskworks Inc. [PS] DESCRIPTION: Software company	SP	\$100,001 - \$250,000	None		☐
First Citizens Bank [BA]	JT	\$100,001 - \$250,000	None		☐
John Marshall Collins PC, 100% Interest [OL] LOCATION: San Jose, CA, US DESCRIPTION: Law firm. No transaction; Mr. Collins stopped practicing in 2024.	SP	None	None		☐
Residential Rental Property [RP] LOCATION: San Jose, CA, US	JT	\$1,000,001 - \$5,000,000	None		☐
Collins/Lofgren Family Trust ⇒ California State Public Works Board Lease Revenue Bonds, Ser. D [GS]	JT	None	Interest	\$201 - \$1,000	☒
Collins/Lofgren Family Trust ⇒ Cash [BA]	JT	\$1,001 - \$15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Collins/Lofgren Family Trust ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]	JT	None	Capital Gains	\$5,001 - \$15,000	☒
Collins/Lofgren Family Trust ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]	JT	\$1,001 - \$15,000	Dividends	\$5,001 - \$15,000	☐
Collins/Lofgren Family Trust ⇒ FlexShares Global Upstream Natural Resources Index Fund ETF (GUNR) [EF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Collins/Lofgren Family Trust ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Collins/Lofgren Family Trust ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	JT	\$15,001 - \$50,000	None		☒
Collins/Lofgren Family Trust ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☒
Collins/Lofgren Family Trust ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	☒
Collins/Lofgren Family Trust ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Collins/Lofgren Family Trust ⇒ iShares Trust iShares Global REIT ETF (REET) [EF]	JT	None	Capital Gains, Dividends	\$201 - \$1,000	☒
Collins/Lofgren Family Trust ⇒ Lynwood Unified School District GO Bonds [GS]	JT	None	Interest	\$5,001 - \$15,000	☒
Collins/Lofgren Family Trust ⇒ PIMCO Income Fund Insti Class (PIMIX) [MF]	JT	\$250,001 - \$500,000	Dividends	\$201 - \$1,000	☒
Collins/Lofgren Family Trust ⇒ ProShares DJ Brookfield Global Infrastructure ETF (TOLZ) [EF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Collins/Lofgren Family Trust ⇒ SPDR Nuveen Bloomberg High Yield Municipal Bond ETF (HYMB) [EF]	JT	None	Capital Gains, Dividends	\$201 - \$1,000	☒
Collins/Lofgren Family Trust ⇒	JT	\$250,001 -	Dividends	\$1,001 -	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TCW Transform 500 ETF (VOTE) [EF]		\$500,000		\$2,500	☐
Collins/Lofgren Family Trust ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Fidelity 457 Deferred Compensation ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity 457 Deferred Compensation ⇒ Fidelity Contrafund K6 (FLCNX) [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 Fund Insti Plus (VEMPX) [MF]		\$100,001 - \$250,000	Tax-Deferred		☐
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VHIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☐
John Marshall Collins Rollover IRA ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]	SP	\$1,001 - \$15,000	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 Core S&P Small-Cap ETF (IJR) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
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 ⇒ PIMCO Income Fund Insti Class (PIMIX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		☒
John Marshall Collins Rollover IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	\$250,001 - \$500,000	Tax-Deferred		☒
Zoe Lofgren Trad IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Zoe Lofgren Trad IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]					☐
Zoe Lofgren Trad IRA ⇒ PIMCO Income Fund Insti Class (PIMIX) [MF]		\$1,001 - \$15,000	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?
Collins/Lofgren Family Trust ⇒ California State Public Works Board Lease Revenue Bonds, Ser. D [GS]	JT	12/11/2025	S	\$1,001 - \$15,000	☐
Collins/Lofgren Family Trust ⇒ Lynwood Unified School District GO Bonds [GS]	JT	12/11/2025	S	\$100,001 - \$250,000	☐
Zoe Lofgren Trad IRA ⇒ PIMCO Income Fund Insti Class (PIMIX) [MF]		12/12/2025	P	\$1,001 - \$15,000	
Zoe Lofgren Trad IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]		12/12/2025	S	\$1,001 - \$15,000	☐
Zoe Lofgren Trad IRA ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]		12/12/2025	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ PIMCO Income Fund Insti Class (PIMIX) [MF]	SP	12/12/2025	P	\$250,001 - \$500,000	
John Marshall Collins Rollover IRA ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]	SP	12/11/2025	S	\$15,001 - \$50,000	☐
John Marshall Collins Rollover IRA ⇒ FlexShares Global Upstream Natural Resources Index Fund ETF (GUNR) [EF]	SP	12/11/2025	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	12/11/2025	S (partial)	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Collins/Lofgren Family Trust ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]	JT	12/12/2025	S	\$15,001 - \$50,000	☒
Collins/Lofgren Family Trust ⇒ FlexShares Global Upstream Natural Resources Index Fund ETF (GUNR) [EF]	JT	12/12/2025	S	\$1,001 - \$15,000	☒
Collins/Lofgren Family Trust ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	JT	12/12/2025	P	\$1,001 - \$15,000	
Collins/Lofgren Family Trust ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	JT	12/12/2025	P	\$15,001 - \$50,000	
Collins/Lofgren Family Trust ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]	JT	12/12/2025	P	\$15,001 - \$50,000	
Collins/Lofgren Family Trust ⇒ PIMCO Income Fund Insti Class (PIMIX) [MF]	JT	12/12/2025	P	\$250,001 - \$500,000	
Collins/Lofgren Family Trust ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	JT	12/12/2025	S	\$15,001 - \$50,000	☒
Collins/Lofgren Family Trust ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	JT	12/12/2025	S	\$15,001 - \$50,000	☒
John Marshall Collins Rollover IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	SP	12/11/2025	P	\$15,001 - \$50,000	
Fidelity 457 Deferred Compensation ⇒ EuroPacific Growth Fund Cl R-6 (REGX) [MF]		12/03/2025	S (partial)	\$1,001 - \$15,000	☐
Fidelity 457 Deferred Compensation ⇒ Fidelity Contrafund K6 (FLCNX) [MF]		12/03/2025	S (partial)	\$1,001 - \$15,000	☐
Fidelity 457 Deferred Compensation ⇒ MissionSquare PLUS R13 Fund [OT]		12/03/2025	S (partial)	\$1,001 - \$15,000	☐
LOCATION: US DESCRIPTION: Mutual Fund; EIF					
Fidelity 457 Deferred Compensation ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX) [MF]		12/03/2025	S (partial)	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIIIX) [MF]		12/03/2025	S (partial)	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ iShares iBoxx \$ High Yield Corporate Bond ETF (HYG) [EF]	SP	12/11/2025	S	\$15,001 - \$50,000	☐
John Marshall Collins Rollover IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]	SP	12/11/2025	S	\$100,001 - \$250,000	☐
John Marshall Collins Rollover IRA ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]	SP	12/11/2025	S (partial)	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	SP	12/11/2025	S	\$50,001 - \$100,000	☐
John Marshall Collins Rollover IRA ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	SP	12/11/2025	S	\$15,001 - \$50,000	☐
John Marshall Collins Rollover IRA ⇒ iShares Global REIT ETF (REET) [EF]	SP	12/11/2025	S	\$15,001 - \$50,000	☐
John Marshall Collins Rollover IRA ⇒ ProShares DJ Brookfield Global Infrastructure ETF (TOLZ) [EF]	SP	12/11/2025	S	\$1,001 - \$15,000	☐
John Marshall Collins Rollover IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	12/11/2025	P	\$15,001 - \$50,000	
John Marshall Collins Rollover IRA ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	SP	12/11/2025	S	\$15,001 - \$50,000	☐
Collins/Lofgren Family Trust ⇒ iShares Global REIT ETF (REET) [EF]	JT	12/12/2025	S	\$1,001 - \$15,000	☒
Collins/Lofgren Family Trust ⇒ ProShares DJ Brookfield Global Infrastructure ETF (TOLZ) [EF]	JT	12/12/2025	S	\$1,001 - \$15,000	☒
Collins/Lofgren Family Trust ⇒ State Street SPDR Nuveen ICE High Yield Municipal Bond ETF (HYMB) [EF]	JT	12/12/2025	S	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Collins/Lofgren Family Trust ⇒ TCW Transform 500 ETF (VOTE) [EF]	JT	12/12/2025	P	\$100,001 - \$250,000	
Collins/Lofgren Family Trust ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	JT	12/12/2025	S	\$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
California Public Employee Retirement System	distribution	\$51,250.00
John Marshall Collins PC	spouse salary	N/A
Zoe Lofgren Trad IRA	distribution	\$716.00
Fidelity 457 Deferred Compensation	distribution	\$27,324.00
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

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

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

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