



Filing ID #10075192

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Lateefah Simon
Status: Member
State/District: CA12

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/12/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab ⇒ iShares ESG Aware 1-5 Year USD Corporate Bond ETF (SUSB) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab ⇒ iShares ESG MSCI KLD 400 ETF (DSI) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab ⇒ iShares ESG Select Screened S&P Mid-Cap ETF (XJH) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab ⇒ Nuveen ESG Large-Cap Growth ETF (NULG) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab ⇒ SPDR Portfolio Long Term Treasury ETF (SPTL) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [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?
Charles Schwab ⇒ iShares Agency Bond ETF (AGZ) [EF]		02/10/2025	S	\$1,001 - \$15,000	☐
Charles Schwab ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]		02/10/2025	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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Dept of Ed/AIDV	2020	Student Loan	\$10,000 - \$15,000
	Dept of Ed/AIDV	2021	Student Loan	\$15,001 - \$50,000
	Dept of Ed/AIDV	2020	Student Loan	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Boardmember	Ms. Foundation for Women

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

- Charles Schwab

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. Lateefah Simon , 08/12/2026