



Filing ID #10041392

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2017
Filing Date: 07/12/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Abby Huffman 529 Plan ⇒ Fidelity NH Portfolio 2018 [MF] DESCRIPTION: Grandparent contribution	DC	\$15,001 - \$50,000	None		<input type="checkbox"/>
Abby Huffman Child Savings Account ⇒ Abby's Savings Account [BA] DESCRIPTION: Abby's personal checking/savings account	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Abby Huffman Child Savings Account ⇒ Capitol One (formerly ING Direct) CD [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
ADCO Limited partnership units ⇒ Adhesive Coatings Co. Ltd. [OT] DESCRIPTION: Limited partnership units in Adhesive Coatings Co. - partial distribution		\$1 - \$1,000	None		<input type="checkbox"/>
Bank Accounts ⇒ Bank of America Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Bank Accounts ⇒ Redwood Credit Union - Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF]	JT	None	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Sold shares					
Fidelity Joint Brokerage Account ⇒ Fidelity NSDQ Composite Index Tracking [EF]	JT	None	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 220 shares					
Fidelity Joint Brokerage Account ⇒ SPDR S&P500 ETF [EF]	JT	None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 230 shares					
Fidelity Joint Brokerage Account ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Purchased 3,148 shares					
Huffman Family Trust ⇒ DC Residence + rental income [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Washington, DC, US					
DESCRIPTION: Rent checks from tenants					
Jared's Fidelity Rollover IRA ⇒ Claymore Exchange TR Guggenheim Solar [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased 4,513 shares					
Jared's Fidelity Rollover IRA ⇒ Fidelity NSDQ Composite Index Tracking [EF]		None	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ iShares Core S&P500 [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares					
Jared's Fidelity Rollover IRA ⇒ iShares Europe ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Jared's Fidelity Rollover IRA ⇒ iShares TR Global Clean Energy [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Neuberger Berman Social Responsible Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchased additional shares 12/13					
Jared's Fidelity Rollover IRA ⇒ Neuberger Berman Socially Responsive TR [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Powershares Wilder-Hill Clean Energy ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased 6,210 shares					
Jared's Fidelity Rollover IRA ⇒ Vanguard International Equity Index [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Alger Green Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Fidelity Cash Reserves [BA]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase from sale of Total Bond					
Jared's Fidelity Traditional IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased 1,700 shares					
Jared's Fidelity Traditional IRA ⇒ Fidelity NSDQ Composite Index Tracking [EF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold all shares					
Jared's Fidelity Traditional IRA ⇒ Fidelity NSDQ Composite Index Tracking [EF]		None	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 ⇒ iSHARES S&P500 Tracking [EF]		None	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Jared's Fidelity Traditional IRA ⇒ Vanguard FTSE Social Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased 6,022 shares					
Jared's Fidelity Traditional IRA ⇒ Vanguard International Equity Index [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's NRDC Defined Benefit Pension ⇒ NRDC Defined Benefit Pension Account [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Roth IRA ⇒ Alger Green Fund [MF]		\$1,001 - \$15,000	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 ⇒ Fidelity Cash Reserves [BA]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Withdrawal of principal from ROTH IRA					
Jared's Roth IRA ⇒ Vanguard FTSE Social Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Nathan Huffman 529 Plan ⇒ Scholarshare Passive Age-Based Portfolio 9-10 [MF]	DC	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Grandparents contribution					
Nathan Huffman child savings account ⇒ Capitol One (formerly ING Direct) CD [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<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]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Susan's Fidelity Rollover IRA ⇒ Fidelity Cash Reserves [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold shares to purchase mutual funds 7/17/17					
Susan's Fidelity Rollover IRA ⇒ Fidelity Growth and Income Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: purchased shares					
Susan's Fidelity Rollover IRA ⇒ Fidelity Intermediate Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Susan's Fidelity Rollover IRA ⇒ Fidelity Total Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Susan's Fidelity Roth IRA ⇒ Domini Social Equity Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Blue Chip Growth Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Cash Reserves [BA]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Withdrawal of principal from ROTH IRA					
Susan's Fidelity Roth IRA ⇒ Fidelity Dividend Growth Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Low Priced Stock Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Small Cap Stock Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's TIAA-CREF Retirement Account ⇒ CREF Stock Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

* Asset class 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 ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF]	JT	02/2/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Purchase 698 shares					
Fidelity Joint Brokerage Account ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF]	JT	03/28/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Sold 699 shares					
Fidelity Joint Brokerage Account ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF]	JT	03/27/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Sold shares					
Fidelity Joint Brokerage Account ⇒ Fidelity NSDQ Composite Index Tracking [MF]	JT	02/1/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 222 shares					
Fidelity Joint Brokerage Account ⇒ Fidelity NSDQ Composite Index Tracking [MF]	JT	10/25/2017	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 68 shares					
Fidelity Joint Brokerage Account ⇒ SPDR S&P500 ETF [MF]	JT	02/1/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 25 shares					
Fidelity Joint Brokerage Account ⇒ SPDR S&P500 ETF [MF]	JT	10/25/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 28 shares					
Fidelity Joint Brokerage Account ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]	JT	02/2/2017	P	\$1,001 - \$15,000	
DESCRIPTION: Purchase 751 shares					
Fidelity Joint Brokerage Account ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]	JT	11/14/2017	P	\$15,001 - \$50,000	
DESCRIPTION: Bought 2,345 shares					
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund [MF]		02/1/2017	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold 1,000 shares					
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund [MF]		12/5/2017	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold \$19,185					
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund [MF]		01/27/2017	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sold \$32,920					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Jared's Fidelity Rollover IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF] DESCRIPTION: Purchase 1,396 shares		02/2/2017	P	\$15,001 - \$50,000	
Jared's Fidelity Rollover IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF] DESCRIPTION: Purchased 3,032 shares		08/10/2017	P	\$15,001 - \$50,000	
Jared's Fidelity Rollover IRA ⇒ Fidelity NSDQ Composite Index Tracking [MF] DESCRIPTION: Sold 222 shares		02/1/2017	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Fidelity NSDQ Composite Index Tracking [MF] DESCRIPTION: Sold 222 shares		01/27/2017	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ iShares Core S&P500 [EF] DESCRIPTION: Sold shares		01/27/2017	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF] DESCRIPTION: Purchase 1,502 shares		02/2/2017	P	\$15,001 - \$50,000	
Jared's Fidelity Rollover IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF] DESCRIPTION: Bought 1,785 shares		12/12/2017	P	\$15,001 - \$50,000	
Jared's Fidelity Traditional IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF] DESCRIPTION: Purchase 1,657 shares		02/2/2017	P	\$15,001 - \$50,000	
Jared's Fidelity Traditional IRA ⇒ Fidelity NSDQ Composite Index Tracking [MF] DESCRIPTION: Sold 222 shares		02/1/2017	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Fidelity NSDQ Composite Index Tracking [MF] DESCRIPTION: Sold 21 shares		12/6/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Fidelity NSDQ Composite Index Tracking [MF] DESCRIPTION: Sold shares		10/30/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Jared's Fidelity Traditional IRA ⇒ iSHARES S&P500 Tracking [MF] DESCRIPTION: Sold 230 shares		02/1/2017	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ iSHARES S&P500 Tracking [MF] DESCRIPTION: Sold 21 shares		12/6/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ iSHARES S&P500 Tracking [MF] DESCRIPTION: Sold shares		10/30/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF] DESCRIPTION: Purchase 1,784 shares		02/2/2017	P	\$15,001 - \$50,000	
Jared's Fidelity Traditional IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF] DESCRIPTION: Bought 1,219 shares		11/16/2017	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF] DESCRIPTION: Bought 1,973 shares		12/12/2017	P	\$15,001 - \$50,000	
Susan's Fidelity Rollover IRA ⇒ Fidelity Cash Reserves [BA] DESCRIPTION: Sold shares to purchase mutual funds	SP	07/17/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
Susan's Fidelity Rollover IRA ⇒ Fidelity Growth and Income Fund [MF]	SP	07/17/2017	P	\$1,001 - \$15,000	
Susan's Fidelity Rollover IRA ⇒ Fidelity Intermediate Bond Fund [MF]	SP	07/17/2017	P	\$1,001 - \$15,000	
Susan's Fidelity Rollover IRA ⇒ Fidelity Total Bond Fund [MF]	SP	07/17/2017	P	\$1,001 - \$15,000	

* Asset class 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
San Rafael City Schools	Spouse income from teaching/coaching	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Mortgage, Des Moines, IA	October 2012	Mortgage on personal residence	\$250,001 - \$500,000
JT	Citibank	November 2013	Mortgage on part-time residence in Washington	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2006	Jared Huffman and former employer Natural Resources Defense Council	Defined benefit pension account, with pension benefit beginning in the year 2029

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 ASSET CLASS DETAILS

<ul style="list-style-type: none">Abby Huffman 529 Plan (Owner: DC) LOCATION: CA DESCRIPTION: Daughter's college savings planAbby Huffman Child Savings Account (Owner: DC) LOCATION: CA, US DESCRIPTION: Daughter's child savings accountADCO Limited partnership units LOCATION: CA, US DESCRIPTION: Jared Huffman's limited partnership unites in Adhesive Coatings Co. (ADCO).Bank Accounts (Owner: JT)
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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 NRDC Defined Benefit Pension
DESCRIPTION: Defined benefit pension account for work at Natural Resources Defense Council 2001-06.
- Jared's Roth IRA
DESCRIPTION: Roth IRA owned by Jared Huffman
- Nathan Huffman 529 Plan (Owner: DC)
LOCATION: CA, US
DESCRIPTION: Nathan Huffman college savings plan
- Nathan Huffman child savings account (Owner: DC)
LOCATION: CA, US
DESCRIPTION: Son's child savings account
- Susan's CalSRTS Retirement (Owner: JT)
DESCRIPTION: Susan's California Teachers Retirement Account
- Susan's Fidelity Rollover IRA (Owner: SP)
- Susan's Fidelity Roth IRA (Owner: JT)
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 , 07/12/2021