



Filing ID #10060318

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jessica Morse
Status: Congressional Candidate
State/District: CA03

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2023
Filing Date: 05/9/2024
Period Covered: 01/01/2022– 09/11/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Funds Income Funds of AMER F1 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
CALPERS [DB] DESCRIPTION: CALPERS State Retirement Fund		\$15,001 - \$50,000	Tax-Deferred		
Citigroup, Inc. (C) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Columbia Banking System, Inc. (COLB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Dodge and Cox International Stock 1 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Eventide Dividends Opportunities 1 [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Family Forest Land [RP]	JT	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Placer , CA, US DESCRIPTION: 1/6 share of family forestland held in family trust.					
Fidelity Advisor Freedom 2040 Fund - Class A (1199) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Advisor New Insights [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
PARNASSUS CORE EQUITY INSTITUTIONAL [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Rental Property [RP]		\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	None
LOCATION: Sacramento, CA, US DESCRIPTION: Single family home, investment property.					
SAFEWAY INC. 7.45%27 DUE 09/15/27 [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Corporate security bond					
Savings Plus Target Date Fund 2045 [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: 401K Retirement Fund					
Savings Plus Target Date Fund 2065 [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schools First Federal Credit Union [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Personal checking account					
Schools First Federal Credit Union - Sacramento [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Personal savings account					
SCHWAB VALUE ADVANTAGE MONEY INV [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Studio Apartment [RP]		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Washington, DC, US DESCRIPTION: Studio apartment, investment property.					
SYNCHRONY FINL 4.25%24 DUE 08/15/24 [CS]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Corporate security bond					
Target Retirement 2040 Trust Plus [MF]		\$15,001 - \$50,000	Tax-Deferred		
Target Retirement 2045 Trust Plus [MF]		\$1,001 - \$15,000	Tax-Deferred		
Target Retirement Income Trust Plus [MF]		\$1,001 - \$15,000	Tax-Deferred		
THORNBURG INVESTMENT INCOME BUILDER I [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
THORNBURG STRATEGIC INCOME I [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
United Rentals, Inc. (URI) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
US Treasury Notes and Bills [GS]		\$15,001 - \$50,000	None		
Vanguard Institutional Extended Market Index Trust [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard PRIMECAP Fund Admiral Shares [MF]		\$1,001 - \$15,000	Tax-Deferred		
Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Warner Bros. Discovery, Inc. - Series A (WBD) [ST]		\$1 - \$1,000	None		

* 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
State of California	Salary	\$172,197.34	\$192,591.32

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	PNC Bank	November 2013	Mortgage for DC Studio Apartment, investment property	\$50,001 - \$100,000
	Round Point Mortgage	June 2020	Mortgage - Sacramento Single Family Rental - investment property	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Sierra Nevada Conservancy
COMMENTS: Uncompensated. Board term ended in August 2023	
Board Member	Joint Institute for Wood Products Innovation
COMMENTS: Uncompensated. Term ended in August 2023	
Commission Member	Federal Wildland Fire Management and Mitigation Commission

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

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: Jessica Morse , 05/9/2024