



Filing ID #10059041

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/9/2024
Period Covered: 01/01/2023– 04/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CALPERS [DB] DESCRIPTION: CALPERS State Retirement Fund		\$15,001 - \$50,000	Tax-Deferred		
Family Forest Land [RP] LOCATION: Placer , CA, US DESCRIPTION: 1/6 share of family forestland held in family trust.	JT	\$15,001 - \$50,000	None		
Fidelity Roth IRA ⇒ Fidelity Advisor Freedom 2040 Fund - Class A [MF]		\$50,001 - \$100,000	Tax-Deferred		
Rental Apartment [RP] LOCATION: Washington, DC, US DESCRIPTION: Studio apartment, investment property.		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Rental Property [RP] LOCATION: Sacramento, CA, US DESCRIPTION: Single family home, investment property.		\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	None
Savings Plus Retirement Account ⇒		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Savings Plus Target Date Fund 2045 [MF]					
DESCRIPTION: 401K Retirement Fund					
Savings Plus Retirement Account ⇒ Savings Plus Target Date Fund 2065 [MF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Retirement Account					
Schools First Federal Credit Union [BA]		\$1,001 - \$15,000	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 Account ⇒ American Funds Income Funds of AMER F1 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Citigroup, Inc. (C) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Account ⇒ Columbia Banking System, Inc. (COLB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Dodge and Cox International Stock 1 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Eventide Dividends Opportunities 1 [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Fidelity Advisor New Insights [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Schwab Account ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ PARNASSUS CORE EQUITY INSTITUTIONAL		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[MF]					
Schwab Account ⇒ SAFEWAY INC. 7.45%27 DUE 09/15/27 [CS] DESCRIPTION: Corporate security bond		\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Schwab Account ⇒ SCHWAB VALUE ADVANTAGE MONEY INV [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Schwab Account ⇒ SYNCHRONY FINL 4.25%24 DUE 08/15/24 [CS] DESCRIPTION: Corporate security bond		\$1,001 - \$15,000	Interest	\$201 - \$1,000	None
Schwab Account ⇒ THORNBURG INVESTMENT INCOME BUILDER I [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Schwab Account ⇒ THORNBURG STRATEGIC INCOME I [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ United Rentals, Inc. (URI) [ST] DESCRIPTION: Sold stock in 2024		\$1,001 - \$15,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$201 - \$1,000
Schwab Account ⇒ US Treasury Notes and Bills [GS]		\$15,001 - \$50,000	Interest	\$1 - \$200	None
Schwab Account ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Account ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]		\$1 - \$1,000	None		
Vanguard ⇒ Target Retirement 2040 Trust Plus [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard ⇒ Target Retirement 2045 Trust Plus [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard ⇒ Target Retirement Income Trust Plus [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard ⇒ Vanguard Institutional Extended Market Index Trust [MF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard ⇒ Vanguard PRIMECAP Fund Admiral Shares [MF]		\$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 C: EARNED INCOME

None disclosed.

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
COMMENTS: Uncompensated. Commision term ended March 2024	

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Fidelity Roth IRA
DESCRIPTION: Fidelity ROTH IRA
- Savings Plus Retirement Account
- Schwab Account
LOCATION: US
DESCRIPTION: Schwab investment account
- Vanguard

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