



Filing ID #10056441

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Mr. Michael Craig Simon
Status: Congressional Candidate
State/District: CA48

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 12/19/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Guideline 401k Plan ⇒ VBTLX [MF]		\$1,001 - \$15,000	None		
Guideline 401k Plan ⇒ VEMAX [MF]		\$1,001 - \$15,000	None		
Guideline 401k Plan ⇒ VGSLX [MF]		\$1,001 - \$15,000	None		
Guideline 401k Plan ⇒ VTABX [MF]		\$1,001 - \$15,000	None		
Guideline 401k Plan ⇒ VTMGX [MF]		\$1,001 - \$15,000	None		
Guideline 401k Plan ⇒ VTSAX [MF]		\$15,001 - \$50,000	None		
Health Savings Account ⇒ Cash [BA]		\$15,001 - \$50,000	None		
Merrill Edge 529 Plans ⇒		\$50,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 Plans for Dependents [5P] LOCATION: CA		\$100,000			
Merrill Edge Rollover IRA ⇒ Bank of America Corporation (BAC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Merrill Edge Rollover IRA ⇒ Bank of America NA RASP [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Merrill Edge Rollover IRA ⇒ Biogen Inc. (BIIB) [ST]		\$50,001 - \$100,000	None		
Merrill Edge Rollover IRA ⇒ Brighthouse Annuity [FN]		\$50,001 - \$100,000	None		
Merrill Edge Rollover IRA ⇒ Chevron Corporation (CVX) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Merrill Edge Rollover IRA ⇒ Citigroup, Inc. (C) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Merrill Edge Rollover IRA ⇒ Constellation Energy Corporation (CEG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Merrill Edge Rollover IRA ⇒ Dell Technologies Inc. Class C (DELL) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Merrill Edge Rollover IRA ⇒ Exelon Corporation (EXC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Merrill Edge Rollover IRA ⇒ FedEx Corporation (FDX) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Merrill Edge Rollover IRA ⇒ GE HealthCare Technologies Inc. (GEHC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Merrill Edge Rollover IRA ⇒ General Electric Company (GE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Merrill Edge Rollover IRA ⇒ Hewlett Packard Enterprise Company (HPE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Edge Rollover IRA ⇒ HP Inc. (HPQ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Merrill Edge Rollover IRA ⇒ Intel Corporation (INTC) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Merrill Edge Rollover IRA ⇒ International Business Machines Corporation (IBM) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Merrill Edge Rollover IRA ⇒ Kyndryl Holdings, Inc. (KD) [ST]		\$1,001 - \$15,000	None		
Merrill Edge Rollover IRA ⇒ LEFXX [MF]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	\$5,001 - \$15,000
Merrill Edge Rollover IRA ⇒ McKesson Corporation (MCK) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Merrill Edge Rollover IRA ⇒ QUALCOMM Incorporated (QCOM) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Merrill Edge Rollover IRA ⇒ Tesla, Inc. (TSLA) [ST]		\$1,001 - \$15,000	None		
Merrill Edge Rollover IRA ⇒ Verizon Communications Inc. (VZ) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Merrill Edge Rollover IRA ⇒ Walt Disney Company (DIS) [ST]		\$15,001 - \$50,000	None		
Merrill Edge Rollover IRA ⇒ Westinghouse Air Brake Technologies Corporation (WAB) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Michael C Simon Trust ⇒ Green Future Properties, LLC ⇒ Auto Park Way Building [RP] LOCATION: Escondido/San Diego, CA, US		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
Michael C Simon Trust ⇒ Green Future Properties, LLC ⇒ GFP Checking Account [BA]		\$250,001 - \$500,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Michael C Simon Trust ⇒ Real Estate - Personally Owned ⇒ High Knoll Road Residence ⇒ High Knoll Road Residence [RP] LOCATION: San Diego/San Diego, CA, US		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Michael C Simon Trust ⇒ Real Estate - Personally Owned ⇒ Paint Mountain Road Residence ⇒ Paint Mountain Road Residence [RP] LOCATION: Escondido/San Diego, CA, US		\$1,000,001 - \$5,000,000	None		
Michael C Simon Trust ⇒ Real Estate - Personally Owned ⇒ Sunset Hills Residence ⇒ Sunset Hills Residence [RP] LOCATION: Escondido/San Diego, CA, US		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ 3M Company (MMM) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ AbbVie Inc. (ABBV) [ST]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Airbnb, Inc. - Class A (ABNB) [ST]		\$15,001 - \$50,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Amcor plc Ordinary Shares (AMCR) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ American Airlines Group, Inc. (AAL) [ST]		\$1,001 - \$15,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Amgen Inc. (AMGN) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Apollo Global Management, Inc. (APO) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AT&T Inc. (T) [ST]					
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Baker Hughes Company (BKR) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ BlackRock Innovation and Growth Term Trust Common Shares of Beneficial Interest (BIGZ) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ BlackRock Municipal Income Trust II (BLE) [ST]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Blackrock MuniYield Quality Fund, Inc. (MQY) [ST]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ BP p.l.c. (BP) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Carnival Corporation (CCL) [ST]		\$15,001 - \$50,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Caterpillar, Inc. (CAT) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Chevron Corporation (CVX) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Citigroup, Inc. (C) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Consolidated Edison, Inc. (ED) [ST]					
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ CVS Health Corporation (CVS) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ DBA Sempra (SRE) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ DexCom, Inc. (DXCM) [ST]		\$50,001 - \$100,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Dominion Energy, Inc. (D) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Dow Inc. (DOW) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Edison International (EIX) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Exxon Mobil Corporation (XOM) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ FedEx Corporation (FDX) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Foot Locker, Inc. (FL) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Ford Motor Company (F) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Franklin Resources, Inc. (BEN) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ GE HealthCare Technologies Inc. (GEHC) [ST]		\$1,001 - \$15,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Generac Holdings Inc. (GNRC) [ST]		\$15,001 - \$50,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ General Electric Company (GE) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ General Mills, Inc. (GIS) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ General Motors Company (GM) [ST]		\$50,001 - \$100,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Home Depot, Inc. (HD) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Honda Motor Company, Ltd. (HMC) [ST]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	None
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ HP Inc. (HPQ) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Intel Corporation (INTC) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ International Business Machines Corporation (IBM) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Kyndryl Holdings, Inc. (KD) [ST]		\$1 - \$1,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ M&T Bank Corporation (MTB) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Magna International, Inc. (MGA) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Meta Platforms, Inc. - Class A (META) [ST]		\$15,001 - \$50,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ NetApp, Inc. (NTAP) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Occidental Petroleum Corporation (OXY) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Pfizer, Inc. (PFE) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Plug Power, Inc. (PLUG) [ST]		\$1,001 - \$15,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Realty Income Corporation (O) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Redwood Trust, Inc. (RWT) [ST]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Target Corporation (TGT) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Union Pacific Corporation (UNP) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ VDADX [MF]		\$100,001 - \$250,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Viatris Inc. (VTRS) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ VOLKSWAGEN AG UNSP/ADR (VWAGY) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Walmart Inc. (WMT) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]		\$1,001 - \$15,000	None		
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Wells Fargo & Company (WFC) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Westinghouse Air Brake Technologies Corporation (WAB) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Michael C Simon Trust ⇒ Schwab Brokerage - Individual ⇒ Whirlpool Corporation (WHR) [ST]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
RockeTruck, Inc. [OL]		\$1,000,001 - \$5,000,000	None		
LOCATION: Escondido, CA, US					
DESCRIPTION: Good faith estimate of fair market value of stock owned in RockeTruck.					
Schwab Brokerage - Institutional ⇒ Griffin Capital Qualified Opportunity Fund [HE]		\$500,001 - \$1,000,000	None		
Schwab Brokerage - Institutional ⇒ iBorrow Finance Loan Fund [HE]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Schwab Brokerage - Institutional ⇒ Schwab Municipal Money [BA]		\$50,001 - \$100,000	None		
Scwhab IRA Rollover (Taxable) ⇒ Amazon.com, Inc. (AMZN) [ST]		\$15,001 - \$50,000	None		
Scwhab IRA Rollover (Taxable) ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwhab IRA Rollover (Taxable) ⇒ AWPAX [MF]		\$15,001 - \$50,000	None		
Scwhab IRA Rollover (Taxable) ⇒ Boeing Company (BA) [ST]		\$15,001 - \$50,000	None		
Scwhab IRA Rollover (Taxable) ⇒ BP p.l.c. (BP) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwhab IRA Rollover (Taxable) ⇒ Bristol-Myers Squibb Company (BMY) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwhab IRA Rollover (Taxable) ⇒ Carnival Corporation (CCL) [ST]		\$1,001 - \$15,000	None		
Scwhab IRA Rollover (Taxable) ⇒ Consolidated Edison, Inc. (ED) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Scwhab IRA Rollover (Taxable) ⇒ DuPont de Nemours, Inc. (DD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Scwhab IRA Rollover (Taxable) ⇒ DXC Technology Company (DXC) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Scwhab IRA Rollover (Taxable) ⇒ FNSXX [BA]		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
Scwhab IRA Rollover (Taxable) ⇒ Ford Motor Company (F) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwhab IRA Rollover (Taxable) ⇒ General Electric Company (GE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Scwhab IRA Rollover (Taxable) ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwhab IRA Rollover (Taxable) ⇒ International Business Machines Corporation (IBM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwhab IRA Rollover (Taxable) ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwhab IRA Rollover (Taxable) ⇒ Kyndryl Holdings, Inc. (KD) [ST]		\$1 - \$1,000	None		
Scwhab IRA Rollover (Taxable) ⇒ Lumen Technologies, Inc. (LUMN) [ST]		\$1 - \$1,000	None		
Scwhab IRA Rollover (Taxable) ⇒ Microsoft Corporation (MSFT) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwhab IRA Rollover (Taxable) ⇒ Pfizer, Inc. (PFE) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwhab IRA Rollover (Taxable) ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwhab IRA Rollover (Taxable) ⇒ QUALCOMM Incorporated (QCOM) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Scwhab IRA Rollover (Taxable) ⇒ Rivian Automotive, Inc. - Class A (RIVN) [ST]		\$1,001 - \$15,000	None		
Scwhab IRA Rollover (Taxable) ⇒ Southern Company (SO) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Scwhab IRA Rollover (Taxable) ⇒ Tesla, Inc. (TSLA) [ST]		\$15,001 - \$50,000	None		
Scwhab IRA Rollover (Taxable) ⇒ Thermo Fisher Scientific Inc (TMO) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Scwhab IRA Rollover (Taxable) ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwhab IRA Rollover (Taxable) ⇒ Viatris Inc. (VTRS) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Scwhab IRA Rollover (Taxable) ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]		\$1,001 - \$15,000	None		
Scwhab IRA Rollover (Taxable) ⇒ Westinghouse Air Brake Technologies Corporation (WAB) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Wells Fargo Brokerage ⇒ Cash [BA]		\$1,001 - \$15,000	None		
Wells Fargo Brokerage ⇒ FSNXX [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	None
Wells Fargo Rollover IRA ⇒ Prudential Annuity [FN]		\$100,001 - \$250,000	None		

* 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 Current Year to Filing	Amount Preceding Year
RockeTruck, Inc.	Salary	\$136,585.00	\$73,470.00
Legal services	Spouse income from providing legal services	\$5,000.00	\$4,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	CitiCards	December 2023	Revolving credit card	\$15,001 - \$50,000
JT	Wells Fargo Bank	December 2012	Mortgage on rental property	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
President & CEO	RockeTruck, Inc.
Manager	Green Future Properties, LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
September 1995	General Dynamics Pension Plan and Michael C. Simon	Per the terms of the Plan, monthly pension payments will be made to Mr. Simon starting on March 1, 2024/

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">Guideline 401k PlanHealth Savings AccountMerrill Edge 529 Plans LOCATION: CAMerrill Edge Rollover IRAMichael C Simon TrustMichael C Simon Trust ⇒ Green Future Properties, LLC LOCATION: US DESCRIPTION: 2415 Auto Park Way and company checking accountMichael C Simon Trust ⇒ Real Estate - Personally Owned LOCATION: USMichael C Simon Trust ⇒ Real Estate - Personally Owned ⇒ High Knoll Road Residence LOCATION: USMichael C Simon Trust ⇒ Real Estate - Personally Owned ⇒ Paint Mountain Road Residence LOCATION: USMichael C Simon Trust ⇒ Real Estate - Personally Owned ⇒ Sunset Hills Residence LOCATION: US
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- Michael C Simon Trust ⇒ Schwab Brokerage - Individual
LOCATION: US
- Schwab Brokerage - Institutional
LOCATION: US
- Scwhab IRA Rollover (Taxable)
- Wells Fargo Brokerage
LOCATION: US
- Wells Fargo Rollover IRA

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: Mr. Michael Craig Simon , 12/19/2023