



Filing ID #10056480

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: John Munn
Status: Congressional Candidate
State/District: CA04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 12/29/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America CD [BA] DESCRIPTION: Income reinvestment	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Bank of America Personal Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Bank of America Savings Account [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Buffalo Funds Roth IRA ⇒ Buffalo Small Cap (BUFSX) [MF] DESCRIPTION: Income reinvestment		\$1,001 - \$15,000	None		
California Public Employees Retirement System [PE] DESCRIPTION: California Department of Forestry and Fire Protection (CDF/CalFire) Retirement		Undetermined	Retirement	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
California Water Service Group (CWT) [ST] DESCRIPTION: Income reinvestment	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
CF 20 Acres (APN 026-060-010) [RP] LOCATION: Amador County, CA, US		\$100,001 - \$250,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: 20% undivided interest, forestland.					
CF Cabins (APN 039-270-035) [RP]		\$250,001 - \$500,000	None		
LOCATION: El Dorado County, CA, US DESCRIPTION: 10% undivided interest, forestland/grazing/recreation					
CF Lots (2) by Podesta Meadow [RP]		\$100,001 - \$250,000	None		
LOCATION: El Dorado County, CA, US DESCRIPTION: 10% undivided interest, recreation. Subdivision map with lot numbers not on record at El Dorado County.					
CF Timothy (APN 026-060-015) [RP]		\$50,001 - \$100,000	None		
LOCATION: Amador County, CA, US DESCRIPTION: 50% undivided interest, forestland/grazing					
CF Upper Mdw. (APN 039-270-023) [RP]		\$250,001 - \$500,000	None		
LOCATION: El Dorado County, CA, US DESCRIPTION: 10% undivided interest, grazing					
CF West (APN 026-060-014) [RP]		\$50,001 - \$100,000	None		
LOCATION: Amador County, CA, US DESCRIPTION: 50% undivided interest, forestland.					
Chase Bank CD [IH]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Income reinvestment					
Chase Bank House Checking Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Chase Bank Personal Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Chase Bank Reserve Checking Account [BA]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Chevron Corporation (CVX) [ST]	SP	\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: Income reinvestment					
Chevron Corporation (CVX) [ST]	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: Income reinvestment					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chevron Corporation (CVX) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Income reinvestment					
El Dorado Savings Bank - Ranch Checking Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
El Dorado Savings Bank - Ranch Savings Account [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Fidelity ⇒ Enbridge Inc (ENB) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Income reinvestment					
Fidelity ⇒ Fidelity CA Muni Money Market [BA]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Income reinvestment					
Fidelity ⇒ Fidelity Gov. Money Market Acct. (SPAXX) [BA]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Income reinvestment					
Fidelity ⇒ Fidelity Government Money Market [BA]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Income reinvestment					
Fidelity ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [ST]	SP	\$50,001 - \$100,000	None		
Fidelity ⇒ Roche Holdings AG Basel American Depositary Shares (RHHBY) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Income reinvestment					
Fidelity ⇒ Sanofi - American Depositary Shares (SNY) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Income reinvestment					
Firsttrade ⇒ Abbott Laboratories (ABT) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Income reinvestment					
Firsttrade ⇒ AbbVie Inc. (ABBV) [ST]	SP	\$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
DESCRIPTION: Income reinvestment					
Firsttrade ⇒ AT&T Inc. (T) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Income reinvestment					
Firsttrade ⇒ Eversource Energy, Inc. (EVRG) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Income reinvestment					
Firsttrade ⇒ iShares Gold ETF [EF]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Income Retained in Brokerage Account					
Firsttrade ⇒ Johnson & Johnson Common Stock When-Distributed (JNJ.Z) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Income reinvestment					
Firsttrade ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Income reinvestment					
Firsttrade ⇒ Olin Corporation (OLN) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Income reinvestment					
Firsttrade ⇒ Organon & Co. (OGN) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	None
DESCRIPTION: Income reinvestment					
Firsttrade ⇒ Suburban Propane Partners, L.P. (SPH) [ST]	SP	\$15,001 - \$50,000	None		
Firsttrade ⇒ Verizon Communications Inc. (VZ) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Income reinvestment					
Firsttrade ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]	SP	\$1,001 - \$15,000	None		
Franklin Mutual Global Discovery [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Income reinvestment					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Franklin Mutual Global Discovery IRA [MF] DESCRIPTION: Income reinvestment	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
LCF Highway (APN 026-060-012) [RP] LOCATION: Amador County, CA, US DESCRIPTION: Forestland		\$250,001 - \$500,000	None		
LCF South (APN 026-100-001) [RP] LOCATION: Amador County, CA, US DESCRIPTION: Forestland		\$500,001 - \$1,000,000	None		
LCF TPZ (APN 026-060-13) [RP] LOCATION: Amador County, CA, US		\$250,001 - \$500,000	None		
Mairs & Powers Growth Roth IRA [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Morgan Stanley ⇒ American Balanced F2 (AMBFX) [MF] DESCRIPTION: Income reinvestment	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Morgan Stanley ⇒ Calamos Market Neutral INC (CMNIX) [MF] DESCRIPTION: Income reinvestment	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley ⇒ Cohen & Steers Real Est SECS I (CSDIX) [MF] DESCRIPTION: Income reinvestment	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley ⇒ First Eagle Global I (SGHX) [MF] DESCRIPTION: Income reinvestment	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley ⇒ Invesco Cap Appreciation Y (OTCYX) [MF] DESCRIPTION: Income reinvestment	SP	\$50,001 - \$100,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
Morgan Stanley ⇒ IO Hedge Multi-Strat Tracker (OAI) [EF] DESCRIPTION: Income reinvestment	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley ⇒ iShares Core MSCI EAFE (IEFA) [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley ⇒ iShares Russell 1000 Grw ETF (IWF) [EF] DESCRIPTION: Income reinvestment	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley ⇒ iShares Russell 1000 Value ETF (IWD) [EF] DESCRIPTION: Income reinvestment	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley ⇒ JPMorgan Mid Cap Value I (JMV SX) [MF] DESCRIPTION: Income reinvestment	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Morgan Stanley ⇒ Merger Fund Institutional (MERIX) [MF] DESCRIPTION: Income reinvestment	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley ⇒ Metropolitan West Tot Ret BD I (MWTIX) [MF] DESCRIPTION: Income reinvestment	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Morgan Stanley ⇒ Morgan Stanley Private Bank NA [BA] DESCRIPTION: Income reinvestment	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Morgan Stanley ⇒ Principal Equity Inc I (PEIIX) [MF] DESCRIPTION: Income reinvestment	SP	\$15,001 - \$50,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley ⇒ SPDR Nuveen Bloomberg MUNICI (TFI) [EF] DESCRIPTION: Income reinvestment	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	None
Morgan Stanley ⇒ SPDR S&P 500 ETF Trust (SPY) [EF] DESCRIPTION: Income reinvestment	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Morgan Stanley ⇒ United States Treasury Bill [GS]	SP	\$15,001 - \$50,000	None		
Morgan Stanley ⇒ United States Treasury Bill [GS]	SP	\$15,001 - \$50,000	None		

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Morgan Stanley ⇒ United States Treasury Bill [GS]	SP	\$15,001 - \$50,000	None		
Morgan Stanley ⇒ Vanguard Mid-Cap ETF Index (VO) [EF] DESCRIPTION: Income reinvestment	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley ⇒ Vanguard Sall Cap ETF (VB) [EF] DESCRIPTION: Income reinvestment	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Pacific Gas & Electric Co. (PCG) [ST]	SP	\$1,001 - \$15,000	None		
Royce Pennsylvania [MF] DESCRIPTION: Income reinvestment	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
SC Parcel 18 (APN 110-011-015) [RP] LOCATION: Amador County, CA, US DESCRIPTION: Ranchland		\$250,001 - \$500,000	Pasturage	\$1,001 - \$2,500	\$1,001 - \$2,500
SC Parcel 20 (APN 110-011-13) [RP] LOCATION: Amador County, CA, US DESCRIPTION: Ranchland		\$250,001 - \$500,000	Pasturage	\$2,501 - \$5,000	\$2,501 - \$5,000
Schwab Roth IRA ⇒ First Eagle Overseas A (SGOVX) [MF] DESCRIPTION: Income reinvestment		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Roth IRA ⇒ iShares Gold ETF (IAU) [BA]		\$1,001 - \$15,000	None		
Schwab Roth IRA ⇒ SPDR Gold Shares ETF [EF]		\$1,001 - \$15,000	None		
Sempra Energy 6% Mandatory Convertible Preferred Stock, Series A (SRE\$A) [ST] DESCRIPTION: Income reinvestment	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
U.S. Bancorp (USB) [ST]	SP	\$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
DESCRIPTION: Income reinvestment					
UC Defined Contribution Plan [IH]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: Income reinvestment					
University of California Retirement System [PE]	SP	Undetermined	Retirement	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: University of California Library Retirement					
Wells Fargo & Company (WFC) [ST]	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000

* 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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bypass Trust created under Munn Revocable Trust, June 23, 1992	December 2014	Promissory note to Bypass Trust for property purchase	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Bypass Trust created under the Munn Revocable Trust , June 23, 1992
Co-Trustee	Survivors Trust created under the Munn Revocable Trust, June 23, 1992
Proprietor	Personally owned ranchland and forestland

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2019	Shelley Munn with the University of California Retirement System	Monthly pension payment for years of work at the University of California, Davis library
May 2009	John Munn with California Public Employees Retirement Systeme	Pension for years of work with the California Department of Forestry and Fire Protection

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

Source (Name and Address)	Brief Description of Duties
John Joses (Ione, CA, US)	Ranchland owner

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">◦ Buffalo Funds Roth IRA DESCRIPTION: Income reinvestment◦ Fidelity (100% Interest) (Owner: SP) LOCATION: US DESCRIPTION: Brokerage Account, income reinvestment◦ Firsttrade (100% Interest) (Owner: SP) LOCATION: US DESCRIPTION: Brokerage Account, income reinvestment◦ Morgan Stanley (100% Interest) (Owner: SP) LOCATION: US DESCRIPTION: Brokerage Account, income reinvestment◦ Schwab Roth IRA DESCRIPTION: Brokerage account, income reinvestment

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: John Munn , 12/29/2023