



Filing ID #10041369

# 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:** 2016  
**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 ⇒<br>Fidelity NH Portfolio 2018 [MF]<br><br>DESCRIPTION: Grandparent contribution   | DC    | \$15,001 - \$50,000 | None           |                   | <input type="checkbox"/>            |
| Abby Huffman Child Savings Account ⇒<br>Abby's Savings Account [BA]<br><br>DESCRIPTION: Abby's personal checking/savings account                                  | DC    | \$1,001 - \$15,000  | Interest       | \$1 - \$200       | <input type="checkbox"/>            |
| Abby Huffman Child Savings Account ⇒<br>Capitol One (formerly ING Direct) CD [BA]   | DC    | \$1,001 - \$15,000  | Interest       | \$1 - \$200       | <input type="checkbox"/>            |
| ADCO Limited partnership units ⇒<br>Adhesive Coatings Co. Ltd. [OT]<br><br>DESCRIPTION: Limited partnership units in Adhesive Coatings Co. - partial distribution |       | \$1 - \$1,000       | Capital Gains  | \$1,001 - \$2,500 | <input checked="" type="checkbox"/> |
| Bank Accounts ⇒<br>Bank of America Checking [BA]  | JT    | \$1,001 - \$15,000  | None           |                   | <input type="checkbox"/>            |
| Bank Accounts ⇒<br>Redwood Credit Union - Checking [BA]   | JT    | \$1,001 - \$15,000  | None           |                   | <input type="checkbox"/>            |
| Bank Accounts ⇒<br>Westamerica Checking [BA]  | JT    | \$1,001 - \$15,000  | None           |                   | <input type="checkbox"/>            |

| Asset  | Owner | Value of Asset       | Income Type(s)           | Income          | Tx. > \$1,000?           |
|--|-------|----------------------|--------------------------|-----------------|--------------------------|
| Fidelity Joint Brokerage Account ⇒ ONEQ NASDAQ Tracking [EF]                     | JT    | \$15,001 - \$50,000  | Capital Gains, Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Fidelity Joint Brokerage Account ⇒ SPDR S&P500 ETF [EF]                          | JT    | \$1,001 - \$15,000   | Tax-Deferred             |                 | <input type="checkbox"/> |
| 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]          |       | \$50,001 - \$100,000 | Tax-Deferred             |                 | <input type="checkbox"/> |
| Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market [BA]            |       | \$1 - \$1,000        | Tax-Deferred             |                 | <input type="checkbox"/> |
| Jared's Fidelity Rollover IRA ⇒ Fidelity NSDQ Composite Index Tracking [EF]      |       | \$1,001 - \$15,000   | 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]                         |       | \$1,001 - \$15,000   | Tax-Deferred             |                 | <input type="checkbox"/> |
| Jared's Fidelity Rollover IRA ⇒ iShares Europe ETF [EF]                          |       | \$1,001 - \$15,000   | Tax-Deferred             |                 | <input type="checkbox"/> |
| 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 International Equity Index [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 Traditional IRA ⇒<br>Alger Green Fund [MF]                         |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| Jared's Fidelity Traditional IRA ⇒<br>Fidelity Cash Reserves [BA]                   |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| DESCRIPTION: Purchase from sale of Total Bond                                       |       |                     |                |        |                          |
| Jared's Fidelity Traditional IRA ⇒<br>Fidelity NSDQ Composite Index Tracking [EF]   |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| Jared's Fidelity Traditional IRA ⇒<br>Fidelity Total Bond Fund [MF]                 |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| DESCRIPTION: Sold shares to buy other funds   |       |                     |                |        |                          |
| Jared's Fidelity Traditional IRA ⇒<br>iSHARES S&P 500 Tracking [EF]                 |       | \$15,001 - \$50,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Jared's Fidelity Traditional IRA ⇒<br>ONEQ NASDAQ Tracking [EF]                     |       | \$15,001 - \$50,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Jared's Fidelity Traditional IRA ⇒<br>Vanguard FTSE Social Index [MF]               |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| Jared's Fidelity Traditional IRA ⇒<br>Vanguard International Equity Index [EF]      |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| Jared's NRDC Defined Benefit Pension ⇒<br>NRDC Defined Benefit Pension Account [PE] |       | \$15,001 - \$50,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Jared's Roth IRA ⇒<br>Alger Green Fund [MF]   |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| Jared's Roth IRA ⇒<br>Fidelity Cash Reserves [BA]                                   |       | \$1 - \$1,000       | Tax-Deferred   |        | <input type="checkbox"/> |
| Jared's Roth IRA ⇒<br>Fidelity Cash Reserves [BA]                                   |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| DESCRIPTION: Withdrawal of principal from ROTH IRA                                  |       |                     |                |        |                          |
| Jared's Roth IRA ⇒<br>Vanguard FTSE Social Index [MF]                               |       | \$1,001 - \$15,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| Nathan Huffman 529 Plan ⇒<br>Scholarshare Passive Age-Based Portfolio 9-10 [MF]     | DC    | \$15,001 - \$50,000 | None           |        | <input type="checkbox"/> |

| Asset  | Owner | Value of Asset          | Income Type(s)          | Income              | Tx. > \$1,000?                      |
|--|-------|-------------------------|-------------------------|---------------------|-------------------------------------|
| 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"/>            |
| Rental Income from DC Residence [RP]   | JT    | \$500,001 - \$1,000,000 | Rent                    | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| LOCATION: Washington, DC, US   |       |                         |                         |                     |                                     |
| 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 [MF]                      | SP    | \$1,001 - \$15,000      | Tax-Deferred            |                     | <input checked="" type="checkbox"/> |
| DESCRIPTION: Purchase shares from rollover of CD IRA                             |       |                         |                         |                     |                                     |
| 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      | Dividends, Tax-Deferred | \$1 - \$200         | <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"/>            |
| Washington residence [RP]  | JT    | \$500,001 -             | None                    |                     | <input type="checkbox"/>            |

| Asset  | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|----------------|----------------|--------|----------------|
|  |       | \$1,000,000    |                |        |                |
| LOCATION: Washington, DC, US                       |       |                |                |        |                |
| DESCRIPTION: Part-time residence in Washington, DC |       |                |                |        |                |

\* 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?                 |
|--|-------|------------|-------------|--------------------|-------------------------------------|
| ADCO Limited partnership units ⇒ Adhesive Coatings Co. Ltd. [OT] |       | 12/1/2016  | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| LOCATION: US   |       |            |             |                    |                                     |
| DESCRIPTION: Partial distribution                                |       |            |             |                    |                                     |
| Susan's Fidelity Rollover IRA ⇒ Fidelity Cash Reserves [MF]      | SP    | 10/24/2016 | P           | \$1,001 - \$15,000 |                                     |
| DESCRIPTION: Purchase after transferring Discover CD             |       |            |             |                    |                                     |

\* 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 |
|--------------------------------|-----------------------------|--------|
| NOMAR Volleyball Club          | Spouse income from coaching | N/A    |
| Fusion Learning Inc.           | Spouse salary               | N/A    |
| San Rafael City Schools        | Spouse income from teaching | N/A    |
| Novato Unified School District | Spouse income from 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

- Abby Huffman 529 Plan (Owner: DC)  
LOCATION: CA  
DESCRIPTION: Daughter's college savings plan
- Abby Huffman Child Savings Account (Owner: DC)  
LOCATION: CA, US  
DESCRIPTION: Daughter's child savings account
- ADCO Limited partnership units  
LOCATION: CA, US  
DESCRIPTION: Jared Huffman's limited partnership unites in Adhesive Coatings Co. (ADCO).
- Bank Accounts (Owner: JT)  
LOCATION: San Rafael, CA, US  
DESCRIPTION: Checking and savings accounts
- Fidelity Joint Brokerage Account (Owner: JT)  
LOCATION: US
- 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