



Filing ID #10067020

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Heidi Hall
Status: Congressional Candidate
State/District: CA03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 07/01/2025
Period Covered: 01/01/2024– 07/16/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
California Public Employees' Retirement System [DB]		Undetermined	Tax-Deferred		
Golden1 Credit Union [BA] DESCRIPTION: Savings, Money Market, & Checking Account	JT	\$1,001 - \$15,000	None		
Marina Coast Water District [OT] DESCRIPTION: Water Conservation Rebate	SP	Undetermined	Taxable Rebate	None	\$1,001 - \$2,500
Patelco Credit Union [BA] DESCRIPTION: Money Market & Checking Account	JT	\$15,001 - \$50,000	None		
Provident Credit Union - Checking Account [BA]		\$1,001 - \$15,000	None		
Edward Jones - Traditional IRA ⇒ Capital World Growth and Income Fund - Class F-3 (FWGIX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Edward Jones - Traditional IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Edward Jones - Traditional IRA ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Edward Jones - Traditional IRA ⇒ JPMorgan Core Bond Fund R6 (JCBUX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Edward Jones - Traditional IRA ⇒ New World Fund, Inc. - Class F-3 (FNWFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Edward Jones - Traditional IRA ⇒ SMALLCAP World Fund, Inc. - Class F-3 (SFCWX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Edward Jones - Traditional IRA ⇒ T. Rowe Price Capital Appreciation Fund - I Class (TRAIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Edward Jones - Traditional IRA ⇒ The Hartford Dividend & Growth Fund Class F (HDGFX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Edward Jones - Traditional IRA ⇒ U.S. Treasury Money Fund - I Class (TRGXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edward Jones - Traditional IRA - Spouse ⇒ American Funds Global Balanced Fund - Class F-3 (GFBLX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Edward Jones - Traditional IRA - Spouse ⇒ Capital World Growth and Income Fund - Class F-3 (FWGIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edward Jones - Traditional IRA - Spouse ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edward Jones - Traditional IRA - Spouse ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edward Jones - Traditional IRA - Spouse ⇒ John Hancock Multifactor Mid Cap ETF (JHMM) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edward Jones - Traditional IRA - Spouse ⇒	SP	\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JPMorgan Core Bond Fund R6 (JCBUX) [MF]		\$100,000			
Edward Jones - Traditional IRA - Spouse ⇒ New World Fund, Inc. - Class F-3 (FNWFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edward Jones - Traditional IRA - Spouse ⇒ SMALLCAP World Fund, Inc. - Class F-3 (SFCWX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Edward Jones - Traditional IRA - Spouse ⇒ T. Rowe Price Capital Appreciation Fund - I Class (TRAIX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Edward Jones - Traditional IRA - Spouse ⇒ The Hartford Dividend & Growth Fund Class F (HDGFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edward Jones - Traditional IRA - Spouse ⇒ U.S. Treasury Money Fund - I Class (TRGXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edward Jones - Traditional IRA # 2 - Spouse ⇒ Pfizer, Inc. Common Stock (PFE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Nationwide - Nevada County California 401(a) ⇒ Nationwide Fixed Fund [FN]		\$15,001 - \$50,000	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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
California Public Employees' Retirement System	Pension	\$17,497.62	\$34,309.08
Edward Jones	Spouse IRA Distribution	N/A	N/A
County of Nevada	Salary	\$44,302.08	\$99,304.98
Edward Jones	IRA Distribution	N/A	\$70,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Regions Bank	September 2024	Home Improvement Loan	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	National Association of Counties
Board Member	California State Association of Counties
Board Member	CivicWell

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2023	Filer and California Public Employees' Retirement System	Defined benefit plan that provides service retirement benefits.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">Edward Jones - Traditional IRA - Spouse (Owner: SP)Edward Jones - Traditional IRAEdward Jones - Traditional IRA # 2 - Spouse (Owner: SP)Nationwide - Nevada County California 401(a)

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

COMMENTS

The period covered for this report is 1/1/2024-6/15/2025.

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: Heidi Hall , 07/01/2025