



Filing ID #10068046

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Lateefah Simon
Status: Member
State/District: CA12

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2024
Filing Date: 08/13/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab ⇒ iShares Agency Bond ETF (AGZ) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab ⇒ iShares ESG Aware 1-5 Year USD Corporate Bond ETF (SUSB) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab ⇒ iShares ESG MSCI KLD 400 ETF (DSI) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab ⇒ iShares ESG Select Screened S&P Mid-Cap ETF (XJH) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab ⇒ Nuveen ESG Large-Cap Growth ETF (NULG) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab ⇒ Nuveen ESG Large-Cap Growth ETF (NULG) [EF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab ⇒ SPDR Portfolio Long Term Treasury ETF (SPTL) [EF]		\$1,001 - \$15,000	Tax-Deferred		
RPG Consultants ⇒ Natixis Target Retirement 2035 Fund (NSFGX) [MF]		\$100,001 - \$250,000	Distribution	\$100,001 - \$1,000,000	Not Applicable

* 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
Patricia Quillin	Salary	N/A	\$562,712.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Dept of Ed/AIDV	2021	Student Loan	\$15,001 - \$50,000
	Dept of Ed/AIDV	2020	Student Loan	\$10,000 - \$15,000
	Dept of Ed/AIDV	2020	Student Loan	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	California State University (CSU)
Board of Directors Member	Tipping Point Community
Strategic Advisor	Black Futures Lab
Board Vice Chair and Secretary	Rosenberg Foundation
Trustee	San Francisco Foundation
Senior Advisor	GrantMakers for Girls of Color
Senior Advisor on Police Reform	Office of Governor Gavin Newsom

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Charles Schwab
- RPG Consultants

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: Hon. Lateefah Simon , 08/13/2025