



Filing ID #10006956

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Jared Huffman  
**Status:** Member  
**State/District:** CA02

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2014  
**Filing Date:** 05/20/2015

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Abby Huffman 529 Plan ⇒ Fidelity NH Portfolio 2018  DESCRIPTION: Grandparent contribution	DC	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Abby Huffman Child Savings Account ⇒ Abby's Savings Account  DESCRIPTION: Abby's personal checking/savings account	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Abby Huffman Child Savings Account ⇒ Capitol One (formerly ING Direct) CD	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
ADCO Limited partnership units ⇒ Adhesive Coatings Co. Ltd.  LOCATION: Hillsborough, CA, US DESCRIPTION: Limited partnership units in Adhesive Coatings Co.		\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Bank Accounts ⇒ Bank of America Checking	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Bank Accounts ⇒ Redwood Credit Union - Business Checking  DESCRIPTION: Checking for Susan's business	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank Accounts ⇒ Redwood Credit Union - Checking	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Bank Accounts ⇒ Westamerica Checking	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Fidelity CA Municipal Money Market	JT	\$1 - \$1,000	Interest, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ ONEQ NASDAQ Tracking	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ SPDR S&P500 ETF	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Sold shares					
Jared's Fidelity Rollover IRA ⇒ Claymore Exchange TR Guggenheim Solar		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased					
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Fidelity NSDQ Composite Index Tracking		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased					
Jared's Fidelity Rollover IRA ⇒ iShares Core S&P500		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Rollover IRA ⇒ iShares Europe ETF		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Rollover IRA ⇒ iShares TR Global Clean Energy		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase of shares					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Jared's Fidelity Rollover IRA ⇒ Neuberger Berman Social Responsible Fund		\$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		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Rollover IRA ⇒ Powershares Wilder-Hill Clean Energy ETF		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Rollover IRA ⇒ Vanguard International Equity Index		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Traditional IRA ⇒ Alger Green Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Fidelity Cash Reserves		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase from sale of Total Bond					
Jared's Fidelity Traditional IRA ⇒ Fidelity NSDQ Composite Index Tracking		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Traditional IRA ⇒ Fidelity Total Bond Fund		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold shares to buy other funds					
Jared's Fidelity Traditional IRA ⇒ iSHARES S&P 500 Tracking		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ ONEQ NASDAQ Tracking		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Vanguard FTSE Social Index		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Vanguard International Equity Index		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Jared's NRDC Defined Benefit Pension ⇒ NRDC Defined Benefit Pension Account		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Roth IRA ⇒ Alger Green Fund		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Roth IRA ⇒ Fidelity Cash Reserves		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Jared's Roth IRA ⇒ Fidelity Cash Reserves		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Withdrawal of principal from ROTH IRA					
Jared's Roth IRA ⇒ Vanguard FTSE Social Index		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Nathan Huffman 529 Plan ⇒ Scholarshare Passive Age-Based Portfolio 9-10	DC	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Grandparents contribution					
Nathan Huffman child savings account ⇒ Capitol One (formerly ING Direct) CD	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Susan's CalSRTS Retirement ⇒ CalSTRS Pension Account	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Domini Social Equity Fund	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Blue Chip Growth Fund	JT	\$1,001 - \$15,000	Dividends, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Cash Reserves	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	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Low Priced Stock Fund	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Small Cap Stock Fund	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Susan's Fidelity Roth IRA ⇒ Microsoft Corporation (MSFT)	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's IRA CD Account ⇒ Discover CD	SP	\$1,001 - \$15,000	Interest, Tax-Deferred	\$1 - \$200	<input type="checkbox"/>
Susan's TIAA-CREF Retirement Account ⇒ CREF Stock Fund	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Washington residence	JT	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
LOCATION: Washington, DC, US DESCRIPTION: Part-time residence in Washington, DC					

\* Asset class details available at the bottom of this form.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Abby Huffman 529 Plan ⇒ Fidelity NH Portfolio 2018	DC	05/14/2014	P	\$1,001 - \$15,000	
LOCATION: CA DESCRIPTION: Grandparents' contribution to 529 plan					
ADCO Limited partnership units ⇒ Adhesive Coatings Co. Ltd.		06/2/2014	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
LOCATION: US DESCRIPTION: Sale of ADCO Ltd. Partnership Units					
Jared's Fidelity Rollover IRA ⇒ Claymore Exchange TR Guggenheim Solar		05/20/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Claymore Exchange TR Guggenheim Solar		03/3/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund		12/5/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund		10/14/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund		08/4/2014	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Jared's Fidelity Rollover IRA ⇒ Fidelity NSDQ Composite Index Tracking		07/7/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Fidelity NSDQ Composite Index Tracking		03/27/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index		03/27/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index		03/3/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ iShares Core S&P500		07/7/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ iShares Core S&P500		04/10/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ iShares Europe ETF		07/7/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ iShares Europe ETF		03/3/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ iShares TR Global Clean Energy		07/7/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ iShares TR Global Clean Energy		03/3/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Neuberger Berman Socially Responsive TR		12/15/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Neuberger Berman Socially Responsive TR		07/7/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Powershares Wilder-Hill Clean Energy ETF		03/27/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Powershares Wilder-Hill Clean Energy ETF		03/3/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒		07/7/2014	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard International Equity Index					
Jared's Fidelity Rollover IRA ⇒ Vanguard International Equity Index		03/3/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Fidelity NSDQ Composite Index Tracking		03/27/2014	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Vanguard International Equity Index		03/27/2014	P	\$1,001 - \$15,000	
Nathan Huffman 529 Plan ⇒ Scholarshare Passive Age-Based Portfolio 9-10	DC	05/14/2014	P	\$1,001 - \$15,000	
LOCATION: CA					
DESCRIPTION: Grandparents contribution to 529 plan					

\* Asset class details available at the bottom of this form.

**SCHEDULE C: EARNED INCOME**

Source	Type	Amount
San Rafael City Schools	Spouse income	\$1,288
Folger-Garfield House	Spouses income from vacation rental business	\$4,974

**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	BB&T Mortgage, Whiteville, NC	November 2013	Mortgage on part-time residence in Washington	\$500,001 - \$1,000,000
JT	Discover Card	June 2014	Credit card balance owed	\$10,000 - \$15,000
JT	Bank of America HELOC	September 2014	2nd mortgage/home equity loan on home	\$15,001 - \$50,000

**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

<ul style="list-style-type: none"><li>Abby Huffman 529 Plan (Owner: DC) LOCATION: CA DESCRIPTION: Daughter's college savings plan</li><li>Abby Huffman Child Savings Account (Owner: DC) LOCATION: CA, US DESCRIPTION: Daughter's child savings account</li><li>ADCO Limited partnership units LOCATION: CA, US DESCRIPTION: Jared Huffman's limited partnership unites in Adhesive Coatings Co. (ADCO).</li><li>Bank Accounts (Owner: JT) LOCATION: San Rafael, CA, US DESCRIPTION: Checking and savings accounts</li><li>Fidelity Joint Brokerage Account (Owner: JT) LOCATION: US</li><li>Jared's Fidelity Rollover IRA DESCRIPTION: Rollover IRA owned by Jared Huffman</li><li>Jared's Fidelity Traditional IRA DESCRIPTION: Traditional IRA owned by Jared Huffman</li><li>Jared's NRDC Defined Benefit Pension DESCRIPTION: Defined benefit pension account for work at Natural Resources Defense Council 2001-06.</li><li>Jared's Roth IRA DESCRIPTION: Roth IRA owned by Jared Huffman</li><li>Nathan Huffman 529 Plan (Owner: DC) LOCATION: CA DESCRIPTION: Nathan Huffman college savings plan</li><li>Nathan Huffman child savings account (Owner: DC) LOCATION: CA, US DESCRIPTION: Son's child savings account</li></ul>
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- Susan's CalSRTS Retirement (Owner: JT)  
DESCRIPTION: Susan's California Teachers Retirement Account
- Susan's Fidelity Roth IRA (Owner: JT)  
DESCRIPTION: Roth IRA owned by Susan Huffman
- Susan's IRA CD Account (Owner: SP)  
DESCRIPTION: Discover CD account 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 , 05/20/2015