



Filing ID #10018428

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Jessica Morse
Status: Congressional Candidate
State/District: CA04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 08/14/2017
Period Covered: 01/01/2016– 07/31/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Adele Harmon Family Trust DESCRIPTION: Family trust		\$15,001 - \$50,000	None		
Bank accounts DESCRIPTION: Checking and Savings accounts		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity Roth IRA ⇒ Fidelity ADV Freedom 2040-CL A		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Rental Condo - Washington DC LOCATION: Washington, DC, US		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Schwab Account ⇒ Alcoa Corporation (AA) DESCRIPTION: Sold in 2017		\$1,001 - \$15,000	None		
Schwab Account ⇒ American FD Income Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Account ⇒ Apple Inc. (AAPL)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Account ⇒ Arconic Inc. (ARNC)		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
DESCRIPTION: Sold in 2017					
Schwab Account ⇒ Banco Santander, S.A. Sponsored ADR (SAN)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Citigroup, Inc. (C)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Colony NorthStar, Inc. 8.25% Series B cumulative redeemable perpetual preferred stock (CLNS\$B)		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	None
Schwab Account ⇒ Dodge & Cox INTL Stock		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Fidelity ADV New		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Freeport McMoran		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Corporate bond					
Schwab Account ⇒ General Electric Company (GE)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Account ⇒ Goodhaven FD		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Account ⇒ JP Morgan Strategic INCM		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ KB Home (KBH)		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
DESCRIPTION: Sold in 2017					
Schwab Account ⇒ Microsoft Corporation (MSFT)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Account ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
PACCAR Inc. (PCAR)					
Schwab Account ⇒ Safeway Inc		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Fixed income bond					
Schwab Account ⇒ Schwab Value Advantage Money Market		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Thornberg INVT Income		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Account ⇒ Thornberg Strategic		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Umpqua Holdings Corporation (UMPQ)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Account ⇒ Verizon Communications Inc. (VZ)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Hillary for America 2016	Salary	\$.00	\$9,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	PNC Bank	11/2013	Mortgage on condominium	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Secretary	ANC2B Zoning Historical Preservation Development Board

Position	Name of Organization
Budget Analyst	United States Agency for Intenational Development

SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Hillary for America 2016 (Denver, CO, US)	Campaign staff
USAID (Washington, DC, US)	Budget analyst

SCHEDULE A ASSET CLASS DETAILS

- ☐ Fidelity Roth IRA
 DESCRIPTION: Fidelity ROTH IRA
- ☐ Schwab Account
 LOCATION: US
 DESCRIPTION: Schwab investment account

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: Jessica Morse , 08/14/2017