



Filing ID #10029524

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Sara Jacobs
Status: Congressional Candidate
State/District: CA53

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 01/15/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Essjane, LLC ⇒ Investment Property [RP] LOCATION: New York, NY, US DESCRIPTION: Formerly held in the Sara Jacobs Trust U/A DTD 09/01/2009		\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	\$15,001 - \$50,000
Merrill Lynch - IRA ⇒ Bank of America, NA [BA]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch - IRA ⇒ iShares MSCI Global Impact ETF (SDG) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ American Euro Pacific Growth Fund CL F2 (AEPFX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ American Funds AMCAP Fund CL F2 (AMCFX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000

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American Funds Washington Mutual Inv Fund CL F2 (WMFFX) [MF]					
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Aristotle/Saul Global Opps Fund Class I (ARSOX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Bank of America, N.A. [BA]		\$1,001 - \$15,000	None		
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Delaware Diversified Income Fund Instl CL (DPFFX) [MF]		None	Dividends	None	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Doubleline Core Fixed Income Fund CL I (DBLFX) [MF]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Eaton Vance Rchrd Brstn Equity Strategy Fund CL I (ERBIX) [MF]		\$1,001 - \$15,000	None		
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ First Trust US Equity Opportunities ETF (FPX) [EF]		\$1,001 - \$15,000	None		
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Fuller & Thaler Behavioral Small-Cap Equity Fd CL Instl (FTHSX) [MF]		\$1,001 - \$15,000	None		
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Hotchkis & Wiley Value Opportunities Fund CL I (HWAIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Invesco FTSE RAFI Emerging Markets ETF (PXH) [EF]		None	Dividends	None	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

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⇒ iShares Core Dividend Growth ETF (DGRO) [ST]					
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ iShares EDGE MSCI (ACWV) [EF]		None	Capital Gains	None	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ iShares Intl Select (IDV) [EF]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ iShares TR Core MSCI Total Intl Stock ETF (IXUS) [EF]		None	Dividends	None	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Kopernik Global All Cap Fund Instl Class (KGGIX) [MF]		\$1,001 - \$15,000	None		
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Lyrical US Value Equity (LYRIX) [MF]		None	Capital Gains	None	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Neuberger Berman Strategic Income Fund CL Instl (NSTLX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ PGIM Total Return Bond Fund CL Z (PDBZX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	None
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Pimco All Asset (PALPX) [MF]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Pimco Diversified Income Fund CL I2 (PDVPX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Pimco Income Fund CL P (PONPX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

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Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Pimco Low Duration (PFTPX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Pimco Short Term Fund Class I2 (PTSPX) [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Poplar Forest Partners (IPFPX) [MF]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Powershares FTSE RAFI (PXF) [EF]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Prudential Absolute Return Bond Fund CL Z (PADZX) [MF]		\$1 - \$1,000	Dividends	None	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Prudential Jennison Health Sciences (PHSZX) [MF]		None	Capital Gains	None	\$1,001 - \$2,500
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Putnam Income Fund CL Y (PNCYX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Putnam Short Duration Income Fund CL Y (PSDYX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Rivernorth Double Line Strategic Inc Fund CL I (RNSIX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1 - \$200
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ SPDR Gold Trust (GLD) [EF]		\$1,001 - \$15,000	None		
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Vanguard Div Appreciation ETF (VIG) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000

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Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Vanguard International Dividend Appreciation ETF (VIGI) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	None
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Vanguard Total International Stock ETF (VXUS) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Vanguard Total Stock Market ETF (VTI) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Wisdomtree U.S. Quality Dividend Growth Fund (DGRW) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ QCOM ⇒ Bank of America, N.A. [BA]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ QCOM ⇒ QUALCOMM Incorporated (QCOM) [ST]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Investment Property [RP] LOCATION: Washington, DC, US		\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	\$100,001 - \$1,000,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Main ⇒ Bank of America, N.A. [BA]		\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Main ⇒ Massachusetts Pathways to Economic Advancement 2016 LLC [OL] LOCATION: Boston, MA, US DESCRIPTION: Education Program		\$50,001 - \$100,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni ⇒ Bank of America, N.A. [BA]		\$15,001 - \$50,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒		\$100,001 -	Interest	\$2,501 -	None

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Merrill Lynch - SJ Muni ⇒ BlackRock California Muni Opportunities Fund CL Inst (MACMX) [MF]		\$250,000		\$5,000	
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni ⇒ California St Dept Water Res Cent VY Proj Rev 5.0% Due 12/1/2029 [GS]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni ⇒ California St GO Various Purpose Bonds 5.0% Due 11/1/2029 [GS]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni ⇒ California St Var Purpose Go Bonds 5.0% Due 10/1/2039 [GS]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni ⇒ Los Angeles California Dept Water & Power Sys C 5.0% Due 10/1/2039 [GS]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni ⇒ Los Angeles California Dept Water Works Rev Bonds B 5.0% Due 7/1/2043 [GS]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni ⇒ Los Angeles California Uni Sch Dist Go Bonds LT B-1 5.25% Due 7/1/2042 [GS]		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni ⇒ Los Angeles California Waste Water System Rev 5.0% Due 6/1/2030 [GS]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni ⇒ San Francisco California Bart Dist Election of LT GO 5.0% Due 8/1/2035 [GS]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni ⇒ San Marcos California Uni Sch Dist Go Ref Bonds 5.0% Due 8/1/2036 [GS]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	None

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Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni ⇒ University California Revs Gen Rev AZ 5.0% Due 5/15/2043 [GS]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ QCOM ⇒ Bank of America, N.A. [BA]		\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000	\$2,501 - \$5,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ QCOM ⇒ Beldore Capital Fund LLC [HE]		\$1,000,001 - \$5,000,000	Dividends, Interest	\$50,001 - \$100,000	\$50,001 - \$100,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ QCOM ⇒ Belgard Capital Fund LLC Class I [HE]		\$1,000,001 - \$5,000,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ QCOM ⇒ Clearfork Capital Fund LLC [HE]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends, Interest	\$50,001 - \$100,000	\$50,001 - \$100,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ QCOM ⇒ QUALCOMM Incorporated (QCOM) [ST]		\$5,000,001 - \$25,000,000	Capital Gains, Dividends	Over \$5,000,000	\$100,001 - \$1,000,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$15,001 - \$50,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Adobe Systems Incorporated (ADBE) [ST]		\$50,001 - \$100,000	Capital Gains	None	\$15,001 - \$50,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ AFLAC Incorporated (AFL) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Air Products and Chemicals, Inc. (APD) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$100,001 - \$250,000	Capital Gains	None	\$2,501 - \$5,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500

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American Water Works Company, Inc. (AWK) [ST]					
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Analog Devices, Inc. (ADI) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ ANSYS, Inc. (ANSS) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Apple Inc. (AAPL) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ AvalonBay Communities, Inc. (AVB) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Avangrid, Inc. (AGR) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Bank of America, N.A. [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Bank of New York Mellon Corporation (BK) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Becton, Dickinson and Company (BDX) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Blackbaud, Inc. (BLKB) [ST]		\$15,001 - \$50,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Booking Holdings Inc. (BKNG) [ST]		None	Capital Gains	None	\$15,001 - \$50,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ BorgWarner Inc. (BWA) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None

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Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Chubb Limited (CB) [ST]		None	Dividends	None	\$201 - \$1,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Cigna Corporation (CI) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	\$2,501 - \$5,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Citrix Systems, Inc. (CTXS) [ST]		None	Capital Gains	None	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Costco Wholesale Corporation (COST) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ CVS Health Corporation (CVS) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ East West Bancorp, Inc. (EWBC) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]		\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Ecolab Inc. (ECL) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ F5 Networks, Inc. (FFIV) [ST]		None	Capital Gains	None	\$15,001 - \$50,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ FIRST REPUBLIC BANK (FRC) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ First Solar, Inc. (FSLR) [ST]		\$15,001 - \$50,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	None

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General Mills, Inc. (GIS) [ST]					
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Gilead Sciences, Inc. (GILD) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Hexcel Corporation (HXL) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Hologic, Inc. (HOLX) [ST]		None	Capital Gains	None	\$201 - \$1,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Home Depot, Inc. (HD) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Illumina, Inc. (ILMN) [ST]		\$15,001 - \$50,000	Capital Gains	None	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Ingersoll-Rand plc (IR) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Interface, Inc. (TILE) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Internationa Flavors & Fragrances, Inc. (IFF) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ IPG Photonics Corporation (IPGP) [ST]		\$15,001 - \$50,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ IQVIA Holdings, Inc. (IQV) [ST]		\$50,001 - \$100,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ J.B. Hunt Transport Services, Inc. (JBHT) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500

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Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Johnson & Johnson (JNJ) [ST]		None	Capital Gains, Dividends	None	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Jones Lang LaSalle Incorporated (JLL) [ST]		\$15,001 - \$50,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ KeyCorp (KEY) [ST]		None	Capital Gains, Dividends	None	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Lamb Weston Holdings, Inc. (LW) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ LHC Group - common stock (LHCG) [ST]		\$15,001 - \$50,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ LogMein, Inc. (LOGM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ lululemon athletica inc. (LULU) [ST]		\$15,001 - \$50,000	Capital Gains	None	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Mastercard Incorporated (MA) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Maxim Integrated Products, Inc. (MXIM) [ST]		None	Capital Gains, Dividends	None	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ McCormick & Company, Incorporated (MKC) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Microsoft Corporation (MSFT) [ST]		\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ New York Times Company (NYT) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Nike, Inc. (NKE) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ NXP Semiconductors N.V. (NXPI) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Omniceil, Inc. (OMCL) [ST]		\$15,001 - \$50,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Omnicom Group Inc. (OMC) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Palo Alto Networks, Inc. (PANW) [ST]		\$15,001 - \$50,000	Capital Gains	None	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ PayPal Holdings, Inc. (PYPL) [ST]		\$50,001 - \$100,000	Capital Gains	None	\$5,001 - \$15,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$15,001 - \$50,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch - SJ Trillium ⇒ Quanta Services, Inc. (PWR) [ST]					
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Quest Diagnostics Incorporated (DGX) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Reinsurance Group of America, Incorporated (RGA) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Salesforce.com Inc (CRM) [ST]		\$15,001 - \$50,000	Capital Gains	None	\$15,001 - \$50,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ SBA Communications Corporation - Class A (SBAC) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Starbucks Corporation (SBUX) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ SVB Financial Group (SIVB) [ST]		\$15,001 - \$50,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Target Corporation (TGT) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ The Middleby Corporation (MIDD) [ST]		\$15,001 - \$50,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ The Travelers Companies, Inc. (TRV) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	None
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ TJX Companies, Inc. (TJX) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Tractor Supply Company (TSCO) [ST]					
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Trimble Inc. (TRMB) [ST]					
		\$15,001 - \$50,000	None		
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Unilever NV (UN) [ST]					
		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Verizon Communications Inc. (VZ) [ST]					
		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Wabco Holdings Inc. (WBC) [ST]					
		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Xilinx, Inc. (XLNX) [ST]					
		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Xylem Inc. Common Stock New (XYL) [ST]					
		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium ⇒ Zimmer Biomet Holdings, Inc. (ZBH) [ST]					
		None	Capital Gains, Dividends	None	\$2,501 - \$5,000
The SJJ Irrevocable Trust Dated 12/10/01 ⇒ Northwestern Mutual Survivorship Universal Life [WU]					
		\$500,001 - \$1,000,000	None		

* 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 Current Year to Filing	Amount Preceding Year
University of San Diego	Salary	\$14,563.52	\$2,140.94

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America, N.A.	May 2013	Mortgage on Washington, DC investment property	\$500,001 - \$1,000,000
	Merrill Lynch	April 2012	Portfolio Loan	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Essjane, LLC
Board Member	Equality California

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> Essjane, LLC LOCATION: US Merrill Lynch - IRA Sara J Jacobs 1999 Trust Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP LOCATION: US Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ QCOM LOCATION: US Sara Jacobs Trust U/A DTD 09/01/2009 Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Main LOCATION: US Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Muni LOCATION: US Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ QCOM LOCATION: US Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Trillium LOCATION: US The SJJ Irrevocable Trust Dated 12/10/01
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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

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: Sara Jacobs , 01/15/2020