



Filing ID #10049216

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: 2021
Filing Date: 08/24/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank Accounts ⇒ Redwood Credit Union - Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Fidelity Govt Money Market [BA] DESCRIPTION: CORE account/cash	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Huffman Family Trust ⇒ DC Residence + rental income [RP] LOCATION: Washington, DC, US DESCRIPTION: Rent checks from tenants	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ ALPS Clean Energy [EF] DESCRIPTION: Purchased shares		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market [BA] DESCRIPTION: CORE account/cash		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF] DESCRIPTION: bought shares		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Jared's Fidelity Rollover IRA ⇒ Global X FDS Robotics - BOTZ [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					
Jared's Fidelity Rollover IRA ⇒ MSCI Index Fund - FUTY [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Fidelity Cash Reserves [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: cash account					
Jared's Fidelity Traditional IRA ⇒ Fidelity Total Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Invesco FD TR II Solar ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Bought shares					
Jared's Fidelity Traditional IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					
Jared's Fidelity Traditional IRA ⇒ Vanguard FTSE Social Index [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's NRDC Defined Benefit Pension ⇒ NRDC Defined Benefit Pension Account [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Roth IRA ⇒ Fidelity Cash Reserves [BA]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Jared's Roth IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Bought \$304.83 on 10/26/18					
Jared's Roth IRA ⇒ MSCI Index Fund - FUTY [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Bought \$4,894 on 2/7/18					
Jared's Roth IRA ⇒ Vanguard FTSE Social Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Nathan Huffman Cal ABLE account ⇒ Cal ABLE Moderate Fund [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Nathan's Redwood Credit Union Account 8973 [BA]	DC	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: SSI deposits \$2,864 on 12/16 and 12/30 \$1,040					
Redwood Credit Union Money Market [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Susan's CalSRTS Retirement ⇒ CalSTRS Pension Account [PE]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Susan's Fidelity IRA-BDA ⇒ Invesco FD TR II Solar ETF [EF]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Susan's Fidelity Rollover IRA ⇒ Fidelity Intermediate Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Rollover IRA ⇒ Fidelity Total Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					
Susan's Fidelity Roth IRA ⇒ Domini Social Equity Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Cash Reserves [BA]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Proceeds from sale of mutual funds					
Susan's Fidelity Roth IRA ⇒ Invesco FD TR II Solar ETF [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Susan's Fidelity Roth IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					
Susan's Fidelity Roth IRA ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Susan's TIAA-CREF Retirement Account ⇒ CREF Stock Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>

* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Jared's Fidelity Rollover IRA ⇒ ALPS Clean Energy [EF]		03/5/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ ALPS Clean Energy [EF]		05/4/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ ALPS Clean Energy [EF]		05/12/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		03/5/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		04/12/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		05/4/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		05/6/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		07/16/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Global X FDS Robotics - BOTZ [EF]		05/4/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Jared's Fidelity Rollover IRA ⇒ Global X FDS Robotics - BOTZ [EF]		05/12/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Global X FDS Robotics - BOTZ [EF]		05/12/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Global X FDS Robotics - BOTZ [EF]		07/16/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF]		02/22/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF]		03/4/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF]		04/12/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF]		05/4/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF]		05/6/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF]		07/16/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF]		08/16/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		04/12/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		05/4/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		05/6/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		07/16/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		08/16/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		08/17/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Fidelity Total Bond Fund [EF]		05/6/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		02/22/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		03/5/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		04/12/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		05/4/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		05/6/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Invesco FD TR II Solar ETF [EF]		02/22/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Invesco FD TR II Solar ETF [EF]		03/4/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Invesco FD TR II Solar ETF [EF]		04/12/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Invesco FD TR II Solar ETF [EF]		05/6/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Invesco FD TR II Solar ETF [EF]		05/4/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Invesco FD TR II Solar ETF [EF]		08/17/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒		02/23/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
INVESCO Wilder-Hill Clean Energy ETF [EF]					
Jared's Fidelity Traditional IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		04/20/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		05/4/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		05/6/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		07/16/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		08/16/2021	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		08/17/2021	P	\$1,001 - \$15,000	
Susan's Fidelity IRA-BDA ⇒ Invesco FD TR II Solar ETF [EF]	SP	04/9/2021	P	\$1,001 - \$15,000	
Susan's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF] DESCRIPTION: bought shares	SP	07/16/2021	P	\$1,001 - \$15,000	
Susan's Fidelity Roth IRA ⇒ Domini Impact Equity Investor Fund [MF] DESCRIPTION: purchase shares	SP	07/16/2021	P	\$1,001 - \$15,000	
Susan's Fidelity Roth IRA ⇒ Invesco FD TR II Solar ETF [EF] DESCRIPTION: purchase shares	SP	07/16/2021	P	\$1,001 - \$15,000	
Susan's Fidelity Roth IRA ⇒ Invesco FD TR II Solar ETF [EF]	SP	08/17/2021	P	\$1,001 - \$15,000	
Susan's Fidelity Roth IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]	SP	08/16/2021	P	\$1,001 - \$15,000	
Susan's Fidelity Roth IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]	SP	08/17/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
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* 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
Larkspur-Corte Madera School District	Spouse income	N/A
In Home Support Services wages	Spouse income	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Nationstar Bank dba Mr. Cooper	September 2021	Mortgage on personal residence	\$250,001 - \$500,000
JT	The Money Source	September 2021	Mortgage on part time home in Washington DC	\$500,001 - \$1,000,000

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

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- Bank Accounts (Owner: JT)
LOCATION: San Rafael, CA, US
DESCRIPTION: Checking and savings accounts
- Fidelity Joint Brokerage Account (Owner: JT)
LOCATION: US
- Huffman Family Trust (Owner: JT)
DESCRIPTION: Living Trust for purposes of personal residence
- Jared's Fidelity Rollover IRA
DESCRIPTION: Rollover IRA owned by Jared Huffman
- Jared's Fidelity Traditional IRA
DESCRIPTION: Traditional IRA owned by Jared Huffman
- Jared's NRDC Defined Benefit Pension
DESCRIPTION: Defined benefit pension account for work at Natural Resources Defense Council 2001-06.
- Jared's Roth IRA
DESCRIPTION: Roth IRA owned by Jared Huffman
- Nathan Huffman Cal ABLE account (Owner: DC)
LOCATION: US
- Susan's CalSRTS Retirement (Owner: SP)
DESCRIPTION: Susan's California Teachers Retirement Account
- Susan's Fidelity IRA-BDA (Owner: SP)
- Susan's Fidelity Rollover IRA (Owner: SP)
- Susan's Fidelity Roth IRA (Owner: SP)
DESCRIPTION: Roth IRA 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 , 08/24/2022