



Filing ID #10051323

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Zoe Lofgren  
**Status:** Member  
**State/District:** CA18

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 08/10/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
California Public Employee Retirement System [DB]		Undetermined	None		<input type="checkbox"/>
City National Bank [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ California State Public Works Board Lease Revenue Bonds, Ser. D [GS]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ Cash Sweep [BA]	JT	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ Deckers Outdoor Corporation (DECK) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ Lucid Group, Inc. (LCID) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ Lynwood Unified School District GO Bonds [GS]	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ Southern Company (SO) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity 457 Deferred Compensation ⇒ American Funds Europac Growth R6 [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Fidelity Contrafund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ MissionSquare PLUS R13 Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vanguard Extended Market Index [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity cash account [BA]	JT	\$250,001 - \$500,000	None		<input type="checkbox"/>
John Marshall Collins PC, 100% Interest [OL]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
LOCATION: San Jose, CA, US DESCRIPTION: Law firm.					
John Marshall Collins Rollover IRA ⇒ Abbvie Inc. (ABBV) [CS] DESCRIPTION: Corporate Bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Adobe Inc. (ADBE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Amazon.com, Inc. (AMZN) [CS] DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ American Electric Power Company, Inc. (AEP) [ST] DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ American Electric Power Company, Inc. (AEP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
John Marshall Collins Rollover IRA ⇒ American Tower Corporation (AMT) [CS] DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ American Water Works Company, Inc. (AWK) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Anheuser-Busch Inbev Fin [CS] DESCRIPTION: Corporate Bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Anheuser-Busch Inbev SA Sponsored ADR (BUD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Aon plc Class A Ordinary Shares (AON) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Applied Materials Inc. [CS] DESCRIPTION: Corporate Bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Ares Capital Corporation - Closed End Fund (ARCC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ AT&T Inc. (T) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ AT&T Inc. [CS] DESCRIPTION: Corporate bond.	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Avangrid, Inc. (AGR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Bank of America Corp. MTN [CS] DESCRIPTION: Corporate Bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Bank of America Corporation (BAC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
John Marshall Collins Rollover IRA ⇒ Bank of Montreal Medium Term Note [CS]  DESCRIPTION: Corporate Bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ BCE, Inc. (BCE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Becton, Dickinson and Company (BDX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Blackstone Inc. (BX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Cash / Money Market Sweep [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Caterpillar Inc. (CAT) [CS]  DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Cincinnati Financial Corporation (CINF) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Cintas Corporation (CTAS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Cisco Systems Inc. Noncallable [CS]  DESCRIPTION: Corporate Bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Cisco Systems, Inc. (CSCO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Citigroup, Inc. (C) [CS]  DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Citizens Financial Group, Inc. (CFG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒	SP	\$100,001 -	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
City National Rochdale Fixed Income Opportunities [MF]		\$250,000			<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ CME Group Inc. - Class A (CME) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Coca-Cola Company (KO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Comcast Corporation - Class A (CMCSA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Costco Wholesale Corporation (COST) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Crown Castle International Corp. (CCI) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ CVS Health Corporation (CVS) [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Danaher Corporation (DHR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Dominion Energy, Inc. (D) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Duke Energy Corporation (DUK) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Edwards Lifesciences Corporation (EW) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Emerson Electric Company (EMR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Entergy Corporation (ETR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Equinix, Inc. (EQIX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Eversource Energy (ES) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
John Marshall Collins Rollover IRA ⇒ Fifth Third Bancorp (FITB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ First Horizon Corporation (FHN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ General Mills, Inc. (GIS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Gilead Sciences, Inc. (GILD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Hartford Financial Services Group, Inc. (HIG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ HCA Healthcare, Inc. (HCA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ International Paper Company (IP) [ST]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Interpublic Group of Companies, Inc. (IPG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ iShares Russell 2000 ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Jefferies Group LLC [CS] DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ JP Morgan Chase & Co. [CS] DESCRIPTION: Corporate bond	SP	None	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ JP Morgan Chase & Co. (JPM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ KeyCorp (KEY) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ KLA Corporation (KLAC) [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Corporate bond.					
John Marshall Collins Rollover IRA ⇒ Mastercard Incorporated (MA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ McDonald's Corporation (MCD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ MetLife, Inc. (MET) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Mid-America Apartment Communities, Inc. (MAA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Morgan Stanley (MS) [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ National Retail Properties (NNN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ NetApp, Inc. (NTAP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Newell Brands Inc. (NWL) [ST]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ NextEra Energy, Inc. (NEE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ NXP Semiconductors N.V. (NXPI) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Old Dominion Freight Line, Inc. (ODFL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Oracle Corp. [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Corporate Bond					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
John Marshall Collins Rollover IRA ⇒ Paramount Global Ltd. [CS] DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Paychex, Inc. (PAYX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Pepsico Inc. [CS] DESCRIPTION: Corporate bond	SP	None	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Pepsico, Inc. (PEP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Pfizer Inc (PFE) [CS] DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Procter & Gamble Company (PG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ ProLogis, Inc. (PLD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ QUALCOMM Incorporated (QCOM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Quanta Services, Inc. (PWR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Roper Technologies, Inc. (ROP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ S&P Global Inc. (SPGI) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Sherwin-Williams Company (SHW) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Sonoco Products Company (SON) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ SPDR S&P Dividend ETF (SDY) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>



Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
John Marshall Collins Rollover IRA ⇒ Starbucks Corporation (SBUX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Thermo Fisher Scientific Inc (TMO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ TJX Companies, Inc. (TJX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ T-Mobile US, Inc. (TMUS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Trane Technologies plc (TT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ TransUnion (TRU) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Union Pacific Corporation (UNP) [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate bond.					
John Marshall Collins Rollover IRA ⇒ UnitedHealth Group Incorporated (UNH) [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ US Bancorp [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ Vanguard Global Ex-US Real Estate ETF (VNQI) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Vanguard Real Estate ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Verizon Communications Inc. (VZ) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Verizon Communications Inc. (VZ) [CS] DESCRIPTION: Corporate bond					<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Visa Inc. (V) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Vodafone Group PLC [CS] DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Walgreens Boots Alliance, Inc. (WBA) [CS] DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Walt Disney Company (DIS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Wells Fargo Co MTN [CS] DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Westpac Banking Corporation (WBK) [CS] DESCRIPTION: Corporate bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Residential Rental Property [RP] LOCATION: San Jose, CA, US	JT	\$500,001 - \$1,000,000	Rent	\$2,501 - \$5,000	<input type="checkbox"/>
Satellite Telework Centers [PS] DESCRIPTION: Operates co-working space; Felton, CA	SP	\$250,001 - \$500,000	None		<input type="checkbox"/>
Silicon Valley Bank [BA]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
Zoe Lofgren Trad IRA ⇒ Delaware Diversified Income Fund Class A [MF]		\$1,001 - \$15,000	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?
Fidelity 457 Deferred Compensation ⇒ American Funds Europac Growth R6 [MF]		12/1/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Fidelity Contrafund [MF]		12/1/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ MissionSquare PLUS R13 Fund [MF]		12/1/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vanguard Extended Market Index [MF]		12/1/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index [MF]		12/1/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ AEP Texas Inc. [CS] DESCRIPTION: Corporate bond	SP	09/9/2022	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ Ally Financial Inc. (ALLY) [ST]	SP	06/15/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Amazon.com, Inc. (AMZN) [CS] DESCRIPTION: Corporate bond	SP	03/4/2022	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ Anheuser-Busch Inbev SA Sponsored ADR (BUD) [ST]	SP	09/9/2022	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ Applied Materials, Inc. (AMAT) [ST]	SP	08/25/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Bank of America Corporation (BAC) [ST]	SP	09/9/2022	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ Becton, Dickinson and Company (BDX) [ST]	SP	09/9/2022	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ Charles River Laboratories International, Inc. (CRL) [ST]	SP	08/25/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
John Marshall Collins Rollover IRA ⇒ Citigroup, Inc. (C) [CS] DESCRIPTION: Corporate bond	SP	03/4/2022	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ Credit Suisse USA Inc. [CS] DESCRIPTION: Corporate bond	SP	10/6/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Expedia Group, Inc. (EXPE) [ST]	SP	08/25/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Gilead Sciences, Inc. (GILD) [ST]	SP	09/9/2022	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ Invesco Preferred ETF [EF]	SP	04/28/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ iShares MSCI All Country Asia ex Japan ETF (AAXJ) [EF]	SP	06/16/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ KLA Corporation (KLAC) [CS] DESCRIPTION: Corporate bond	SP	04/4/2022	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ KLA Corporation (KLAC) [CS] DESCRIPTION: Corporate bond	SP	07/8/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Quanta Services, Inc. (PWR) [ST]	SP	09/9/2022	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ SPDR S&P Dividend ETF (SDY) [EF]	SP	09/9/2022	P	\$15,001 - \$50,000	
John Marshall Collins Rollover IRA ⇒ Synchrony Financial (SYF) [ST]	SP	04/28/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Tyson Foods Inc [CS] DESCRIPTION: Corporate bond	SP	03/15/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Union Pacific Corporation (UNP) [ST]	SP	04/4/2022	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Corporate bond.					
John Marshall Collins Rollover IRA ⇒ Vodafone Group PLC [CS]	SP	03/4/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ Walt Disney Company (DIS) [ST]	SP	08/25/2022	P	\$1,001 - \$15,000	

\* 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
John Marshall Collins PC	Spouse salary	N/A
John Marshall Collins Rollover IRA	distribution	N/A
Zoe Lofgren Trad IRA	distribution	\$708.00
Fidelity 457 Deferred Compensation	distribution	\$23,813.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	City National Bank	March 2017	Mortgage on residence, Washington, DC	\$250,001 - \$500,000
JT	Silicon Valley Bank	January 2022	Mortgage on personal residence, San Jose, CA	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
1981	California Public Employees Retirement System (through County of Santa Clara)	Continuing membership (vested) - no continuing contribution by employer or employee
1981	County of Santa Clara	Continuing membership in 457 plan - no continuing contribution by employer or employee

## 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

- Collins/Lofgren Family Trust (Owner: JT)
- Fidelity 457 Deferred Compensation
- John Marshall Collins Rollover IRA (Owner: SP)
- Zoe Lofgren Trad IRA

## 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. Zoe Lofgren , 08/10/2023