



Filing ID #10060189

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Lateefah Simon
Status: Congressional Candidate
State/District: CA12

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 06/14/2024
Period Covered: 01/01/2023– 05/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Money Intelligence Retirement Fund ⇒ NATISIS SUSTAINABLE FUTURE 204 [EF]		\$100,001 - \$250,000	None		
Social K Retirement Plans ⇒ Vanguard Target Retirement 2045 [EF]		\$50,001 - \$100,000	None		

* Investment vehicle 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
Patricia Quillin	Salary	\$193,321.00	\$557,700.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Dept of Ed/AIDV	2021	Student Loan	\$15,001 - \$50,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Dept of Ed/AIDV	2020	Student Loan	\$10,000 - \$15,000
	Dept of Ed/AIDV	2020	Student Loan	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	California State University (CSU)
Board of Directors Member	Tipping Point Community
Strategic Advisor	Black Futures Lab
Board Vice Chair and Secretary	Rosenberg Foundation
Trustee	San Francisco Foundation
Senior Advisor	GrantMakers for Girls of Color
Senior Advisor on Police Reform	Office of Governor Gavin Newsom

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Money Intelligence Retirement Fund
- Social K Retirement Plans

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

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☒ 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: Lateefah Simon , 06/14/2024