



Filing ID #10056015

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Rose Penelope Lagoc Yee
Status: Congressional Candidate
State/District: CA01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 08/03/2025
Period Covered: 01/01/2022– 10/03/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401(k) ⇒ Calvert Global Water Fund Class I (CFWIX) [MF]		\$15,001 - \$50,000	None		
401(k) ⇒ Green Century Balanced Fund Institutional Class (GCBUX) [MF]		\$15,001 - \$50,000	None		
401(k) ⇒ Parnassus Value Equity Fund Institutional Shares (PFPWX) [MF]		\$15,001 - \$50,000	None		
Cash ⇒ Savings and checking accounts [BA]		\$50,001 - \$100,000	None		
Investments ⇒ Boat, 100% Interest [OT] DESCRIPTION: Powerboat: 53' Navigator		\$100,001 - \$250,000	None		
Investments ⇒ Gold and silver jewelry, precious stones [PM]		\$50,001 - \$100,000	None		
Investments ⇒		\$1,000,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Green Retirement, Inc., 100% Interest [OL] LOCATION: Alameda, CA, US DESCRIPTION: Business value		\$5,000,000			
Investments ⇒ House [RP] LOCATION: Redding, CA, US		\$500,001 - \$1,000,000	None		
Investments ⇒ Indigenous Designs, Green Alpha, Suncommon [PS] DESCRIPTION: Equity investments		\$100,001 - \$250,000	None		
Investments ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		\$250,001 - \$500,000	None		
Investments ⇒ Various [CT]		\$50,001 - \$100,000	None		
Roth IRA ⇒ Block, Inc. Class A Common Stock, (SQ) [ST]		\$50,001 - \$100,000	None		
Roth IRA ⇒ Coinbase Global, Inc. - Class A Common Stock (COIN) [ST]		\$15,001 - \$50,000	None		
Roth IRA ⇒ Palantir Technologies Inc. Class A Common Stock (PLTR) [ST]		\$15,001 - \$50,000	None		
Roth IRA ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		\$250,001 - \$500,000	Capital Gains	None	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
Green Retirement, Inc.	Salary	\$60,000.00	\$60,000.00
Green Retirement, Inc.	Spouse salary	\$75,000.00	\$75,000.00
Green Retirement, Inc.	Business generated income	\$45,000.00	\$40,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Truist	June 2014	Boat loan	\$50,001 - \$100,000
	Cross Country Mortgage	Feb 2022	Home loan	\$250,001 - \$500,000
	BMO Bank	June 2022	Car loan	\$100,001 - \$250,000
	Wells Fargo Bank	March 2022	Car loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	American Sustainable Business Council

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">◦ 401(k)◦ Roth IRA◦ Cash LOCATION: US◦ Investments LOCATION: US
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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

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: Rose Penelope Lagoc Yee , 08/03/2025