



Filing ID #10035463

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Zoe Lofgren
Status: Member
State/District: CA19

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 07/24/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Boston Private [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
California Public Employee Retirement System [DB]		Undetermined	None		<input type="checkbox"/>
City National Bank [BA]	JT	\$15,001 - \$50,000	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 ⇒ City National Rochdale Gov't Money Market / Cash Sweep [BA]	JT	\$100,001 - \$250,000	Dividends, Interest	\$2,501 - \$5,000	<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 ⇒ Lynwood Unified School District GO Bonds [GS]	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒	JT	\$15,001 - \$50,000	Dividends	\$201 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Southern Company (SO) [ST]				\$1,000	
Fidelity 457 Deferred Compensation ⇒ American Funds Europac Growth R6 [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Fidelity Contrafund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vanguard Extended Market Index [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vantage PLUS R13 Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins PC, 100% Interest [OL]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: San Jose, CA, US DESCRIPTION: Law firm.					
John Marshall Collins Rollover IRA ⇒ Adobe Systems Incorporated (ADBE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	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"/>
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 ⇒ Amphenol Corporation (APH) [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 checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Apple Inc. (AAPL) [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?
Ares Capital Corporation - Closed End Fund (ARCC) [ST]					
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]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Avangrid, Inc. (AGR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ B&G Foods, Inc. B&G Foods, Inc. (BGS) [ST]	SP	None	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Bank of America Corp. MTN [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Bank of America Corporation (BAC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Bank of Montreal Medium Term Note [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Bank of Nova Scotia MTN [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
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 ⇒ Brookfield Global Listed Real Estate Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Capital One Financial Co [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
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 ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Chubb Limited (CB) [ST]					
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]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Citigroup Inc. [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ City National Rochdale Fixed Income Opportunities Fund Cl N [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ City National Rochdale Government Bond Fund Serv Cl [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" 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 ⇒ CMS Energy Corporation (CMS) [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 ⇒ Colgate-Palmolive Company (CL) [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 ⇒ Danaher Corporation (DHR) [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 ⇒ Dominion Energy, Inc. (D) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ DowDuPont Inc. (DWDP) [ST]	SP	None	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 ⇒ EPR Properties (EPR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Essex Property Trust, Inc. (ESS) [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"/>
John Marshall Collins Rollover IRA ⇒ Facebook, Inc. - Class A (FB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Fiera Capital Emerging Markets Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ General Motors Finl Co [CS] DESCRIPTION: Corporate Bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Gilead Sciences Inc. [CS] DESCRIPTION: Corporate Bond	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Goldman Sachs Grp. Inc. MTN [CS] DESCRIPTION: Corporate Bond	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Healthcare Trust of America, Inc. Class A (HTA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Home Depot Inc. [CS] DESCRIPTION: Corporate Bond	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 ⇒ Home Depot, Inc. (HD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Ingersoll-Rand plc (IR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Intel Corporation (INTC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Invesco Preferred ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Johnson & Johnson (JNJ) [ST]	SP	\$1,001 - \$15,000	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 ⇒ JP Morgan Chase & Co. [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Kimberly-Clark Corporation (KMB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Lamar Advertising CO-A REIT [RE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Liberty Property Trust (LPT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Magna International, Inc. (MGA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Mastercard Incorporated (MA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" 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 ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Microsoft Corporation (MSFT) [ST]					
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 [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" 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 ⇒ NextEra Energy, Inc. (NEE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Oracle Corp. [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
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]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Pepsico, Inc. (PEP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ PNC Financial Services Group, Inc. (PNC) [ST]	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 ⇒ Prudential Financial, Inc. (PRU) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ PulteGroup, Inc. (PHM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Sumitomo Mitsui Finl Grp [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
John Marshall Collins Rollover IRA ⇒ Sysco Corporation (SYY) [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 ⇒ Truist Financial Corporation (TFC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Tyson Foods Inc. [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Union Pacific Corporation (UNP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ United Parcel Service [CS]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" 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 checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Verizon Comm Inc. [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Corporate Bond					
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 ⇒ Visa Inc. (V) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ W.P. Carey Inc. REIT (WPC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Walmart Inc. (WMT) [ST]	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 type="checkbox"/>
John Marshall Collins Rollover IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Waste Management Inc. [CS] DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Wells Fargo Co MTN [CS] DESCRIPTION: Corporate Bond	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Welltower Inc. (HCN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Westpac Banking Corp Noncallable [CS] DESCRIPTION: Corporate Bond; matured in 2019	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Xcel Energy Inc. (XEL) [ST]	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 checked="" 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"/>
Zoe Lofgren Trad IRA ⇒ Delaware Diversified Income Fund Class C [MF]		\$15,001 - \$50,000	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]		07/1/2019	P	\$50,001 - \$100,000	
Fidelity 457 Deferred Compensation ⇒ Fidelity Diversified Int'l [MF]		07/1/2019	S	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vantage PLUS R10 Fund [MF]		07/1/2019	S	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒		07/1/2019	P	\$100,001 -	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vantage PLUS R13 Fund [MF]				\$250,000	
John Marshall Collins Rollover IRA ⇒ Adobe Inc. (ADBE) [ST]	SP	09/11/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	SP	09/11/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Anheuser-Busch Inbev Fin [CS] DESCRIPTION: Corporate Bond	SP	03/11/2019	P	\$15,001 - \$50,000	
John Marshall Collins Rollover IRA ⇒ Anheuser-Busch Inbev Fin [CS] DESCRIPTION: Corporate Bond	SP	04/25/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ AT&T Inc. [CS] DESCRIPTION: Corporate Bond	SP	03/19/2019	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ Bank of America Corp. MTN [CS] DESCRIPTION: Corporate Bond	SP	03/19/2019	P	\$15,001 - \$50,000	
John Marshall Collins Rollover IRA ⇒ Bank of Montreal Medium Term Note [CS] DESCRIPTION: Corporate Bond; Non-callable	SP	11/25/2019	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ Bank of Nova Scotia MTN [CS] DESCRIPTION: Corporate Bond	SP	03/19/2019	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ BlackRock, Inc. (BLK) [ST]	SP	09/11/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Brookfield Global Listed Real Estate Fund [MF]	SP	09/10/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Capital One Finl Co [CS] DESCRIPTION: Corporate Bond	SP	03/25/2019	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ Cisco Systems Inc. Noncallable [CS]	SP	09/9/2019	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Citigroup Inc. [CS]	SP	03/11/2019	P	\$15,001 - \$50,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ City National Rochdale Corporate Bond Fund Serv Cl [MF]	SP	03/11/2019	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ City National Rochdale Corporate Bond Fund Serv Cl [MF]	SP	03/19/2019	S	\$100,001 - \$250,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ City National Rochdale Government Bond Fund Serv Cl [MF]	SP	08/23/2019	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ City National Rochdale Fixed Income Opportunities Cl N [MF]	SP	09/10/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ City National Rochdale Fixed Income Opportunities Class N [MF]	SP	11/22/2019	P	\$1,001 - \$15,000	
John Marshall Collins Rollover IRA ⇒ City National Rochdale Fixed Income Opportunities Fund Cl N [MF]	SP	08/23/2019	P	\$15,001 - \$50,000	
John Marshall Collins Rollover IRA ⇒ Comerica Incorporated (CMA) [ST]	SP	09/11/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Dow Chemical Co [CS]	SP	06/19/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Corporate bond					
John Marshall Collins Rollover IRA ⇒ Dow Chemical Co. [CS]	SP	03/25/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ General Motors Finl Co [CS]	SP	03/19/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Gilead Sciences Inc. [CS]	SP	03/19/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Goldman Sachs Grp Inc. MTN [CS]	SP	03/11/2019	P	\$15,001 - \$50,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Home Depot Inc. [CS]	SP	03/25/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ JP Morgan Chase & Co. [CS]	SP	03/25/2019	P	\$15,001 - \$50,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Mastercard Incorporated (MA) [ST]	SP	09/11/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Morgan Stanley [CS]	SP	03/11/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Oracle Corp. [CS]	SP	03/19/2019	P	\$15,001 - \$50,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Pepsico Inc [CS]	SP	09/30/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Pepsico Inc. [CS]	SP	03/12/2019	P	\$15,001 - \$50,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Pepsico Inc. [CS]	SP	10/21/2019	P	\$15,001 - \$50,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ PulteGroup, Inc. (PHM) [ST]	SP	09/11/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Simon Property Group [CS]	SP	03/25/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒	SP	10/7/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Simon Property Group [CS]					
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Six Flags Entertainment Corporation New (SIX) [ST]	SP	10/31/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Sumitomo Mitsui Finl Grp [CS]	SP	03/11/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ SunTrust Banks, Inc. (STI) [ST]	SP	07/2/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Tyson Foods Inc. [CS]	SP	03/25/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ United Parcel Service [CS]	SP	03/25/2019	P	\$15,001 - \$50,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	SP	09/11/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Vanguard FTSE Developed Markets ETF [EF]	SP	05/9/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Verizon Comm Inc. [CS]	SP	03/11/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Visa Inc. (V) [ST]	SP	09/11/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ W.P. Carey Inc. REIT (WPC) [ST]	SP	09/11/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Waste Management Inc. [CS]	SP	11/25/2019	P	\$1,001 - \$15,000	
DESCRIPTION: Corporate Bond; Callable					
John Marshall Collins Rollover IRA ⇒ Wells Fargo Co MTN [CS]	SP	03/25/2019	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Westpac Banking Corp Noncallable [CS]	SP	04/1/2019	P	\$15,001 - \$50,000	
DESCRIPTION: Corporate Bond					
John Marshall Collins Rollover IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]	SP	09/11/2019	S (partial)	\$1,001 - \$15,000	<input checked="" 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 C: EARNED INCOME

Source	Type	Amount
John Marshall Collin PC	spouse salary	N/A
John Marshall Collins Rollover IRA	spouse required minimum distribution	N/A
California Public Employee Retirement System	pension	\$46,250.00
Fidelity 457 Deferred Compensation	required minimum distribution	\$31,907.00
Zoe Lofgren Traditional IRA	required minimum distribution	\$619.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	City National Bank	March 2017	Mortgage on residence	\$500,001 - \$1,000,000

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 , 07/24/2020