



Filing ID #10037537

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: 2019
Filing Date: 08/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Abby Huffman 529 Plan ⇒ Fidelity NH Portfolio 2018 [MF]	DC	\$50,001 - \$100,000	None		<input type="checkbox"/>
Abby Huffman Child Savings Account ⇒ Abby's Savings Account [BA] DESCRIPTION: Abby's personal checking/savings account	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Abby Huffman Child Savings Account ⇒ Capitol One (formerly ING Direct) CD [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank Accounts ⇒ Bank of America Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Bank Accounts ⇒ Redwood Credit Union - Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF] DESCRIPTION: 10/19/18 Sold \$10,045	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Huffman Family Trust ⇒ DC Residence + rental income [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Washington, DC, US					
DESCRIPTION: Rent checks from tenants					
Jared's Fidelity Rollover IRA ⇒ Claymore Exchange TR Guggenheim Solar [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 9/19/18: Bought \$5,000					
Jared's Fidelity Rollover IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ INVESCO ETF Solar - TAN [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold 594 shares on 6/20/19					
Jared's Fidelity Rollover IRA ⇒ iShares Europe ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ MSCI Index Fund - FUTY [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 2/7/18 Bought \$9474. 00					
Jared's Fidelity Rollover IRA ⇒ Powershares Wilder-Hill Clean Energy ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Rollover IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 1/23/18 Bought \$30,075.00; also 9/19/18 Bought \$5,075					
Jared's Fidelity Rollover IRA ⇒ Vanguard International Equity Index [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Fidelity Cash Reserves [BA]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchase from sale of Total Bond					
Jared's Fidelity Traditional IRA ⇒ Fidelity Ltd Term Bond Fund - FJRLX [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Purchased 1,700 shares					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Jared's Fidelity Traditional IRA ⇒ Fidelity Total Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 10/26/18 Bought \$745.48					
Jared's Fidelity Traditional IRA ⇒ Vanguard FTSE Social Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Vanguard Intermediate Bond Fund - VFSTX [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 2/7/18 Bought \$10,075.00					
Jared's Fidelity Traditional IRA ⇒ Vanguard International Equity Index [EF]		\$1,001 - \$15,000	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 ⇒ Fidelity Cash Reserves [BA]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Withdrawal of principal from ROTH IRA					
Jared's Roth IRA ⇒ First TR NSDQ Clean Edge Green Energy Index [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
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 529 Plan ⇒ Scholarshare Passive Age-Based Portfolio 9-10 [MF]	DC	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Grandparents contribution					
Nathan Huffman child savings account ⇒	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Capitol One (formerly ING Direct) CD [BA]					
Redwood Credit Union Money Market [BA]	JT	\$1,001 - \$15,000	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 Rollover IRA ⇒ Fidelity 500 Class Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
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 Blue Chip Growth Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Cash Reserves [BA]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Withdrawal of principal from ROTH IRA					
Susan's Fidelity Roth IRA ⇒ Fidelity Dividend Growth Fund [MF]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Low Priced Stock Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Fidelity Small Cap Stock Fund [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Susan's TIAA-CREF Retirement Account ⇒ CREF Stock Fund [MF]	SP	\$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?
Jared's Fidelity Rollover IRA ⇒ INVESCO ETF Solar - TAN [MF]		06/20/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Sold 594 shares at \$28/share					
Jared's Fidelity Rollover IRA ⇒ iShares TR Global Clean Energy [MF]		07/5/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Sold all shares					

* 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 salary	N/A
College of Marin Volleyball Camp	Spouse coaching income	N/A
DFC Advisory Services	Spouse income	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Mortgage, Des Moines, IA	October 2012	Mortgage on personal residence	\$250,001 - \$500,000
JT	Citibank	November 2013	Mortgage on part-time residence in Washington	\$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

- Abby Huffman 529 Plan (Owner: DC)
LOCATION: CA
DESCRIPTION: Daughter's college savings plan
- Abby Huffman Child Savings Account (Owner: DC)
LOCATION: CA, US
DESCRIPTION: Daughter's child savings account
- 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 529 Plan (Owner: DC)
LOCATION: CA
DESCRIPTION: Nathan Huffman college savings plan
- Nathan Huffman child savings account (Owner: DC)
LOCATION: CA, US
DESCRIPTION: Son's child savings account
- Susan's CalSRTS Retirement (Owner: JT)
DESCRIPTION: Susan's California Teachers Retirement Account
- Susan's Fidelity Rollover IRA (Owner: SP)
- Susan's Fidelity Roth IRA (Owner: JT)
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 , 08/13/2020