



Filing ID #10053933

# 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:** 2022  
**Filing Date:** 07/10/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank Accounts ⇒ Redwood Credit Union - Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Fidelity Govt Money Market [BA] DESCRIPTION: CORE account/cash	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Fidelity Short Term Bond Fund [MF] DESCRIPTION: Purchased shares	JT	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ SPDR S&P 500 ETF [EF] DESCRIPTION: Purchased shares	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Fidelity Joint Brokerage Account ⇒ Western Alliance Bank CD [BA] DESCRIPTION: Purchase CD	JT	\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
Huffman Family Trust ⇒ DC Residence + rental income [RP] LOCATION: Washington, DC, US DESCRIPTION: Rent checks from tenants	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?
Jared's Fidelity Rollover IRA ⇒ ALPS Clean Energy [EF]		\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Rollover IRA ⇒ American Bond Fund [MF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Rollover IRA ⇒ Baird Aggregate Bond Fund [MF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Rollover IRA ⇒ Fidelity Government Money Market [BA]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: CORE account/cash					
Jared's Fidelity Rollover IRA ⇒ Fidelity Short Term Bond Fund [MF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Rollover IRA ⇒ First TR Nasdaq Clean Edge Green Energy Index [EF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: bought shares					
Jared's Fidelity Rollover IRA ⇒ Global X FDS Robotics - BOTZ [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: bought shares					
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF]		\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					
Jared's Fidelity Rollover IRA ⇒ MSCI Index Fund - FUTY [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: bought shares					
Jared's Fidelity Rollover IRA ⇒ SPDR S&P 500 ETF [MF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Traditional IRA ⇒		\$1 - \$1,000		Tax-Deferred	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Cash Reserves [BA]					
DESCRIPTION: cash account					
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 Nasdaq Clean Edge Green Energy Index [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Jared's Fidelity Traditional IRA ⇒ Invesco FD TR II Solar ETF [EF]		\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Bought shares					
Jared's Fidelity Traditional IRA ⇒ INVESTCO Wilder-Hill Clean Energy ETF [EF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: bought shares					
Jared's Fidelity Traditional IRA ⇒ SPDR S&P 500 ETF [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Purchased shares					
Jared's Fidelity Traditional IRA ⇒ Vanguard FTSE Social Index [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Jared's NRDC Defined Benefit Pension (closed) ⇒ NRDC Defined Benefit Pension Account [PE]		None		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Accepted buyout from pension fund and transferred proceeds into Fidelity Rollover IRA					
Jared's Roth IRA ⇒ Fidelity Cash Reserves [BA]		\$1 - \$1,000		Tax-Deferred	<input type="checkbox"/>
Jared's Roth IRA ⇒ First TR Nasdaq Clean Edge Green Energy Index [MF]		\$1,001 - \$15,000		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"/>
Redwood Credit Union Money Market [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Susan's CalSRTS Retirement ⇒ CalSTRS Pension Account [PE]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Susan's Fidelity IRA-BDA ⇒ Invesco FD TR II Solar ETF [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Susan's Fidelity Rollover IRA ⇒ Fidelity Intermediate Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Rollover IRA ⇒ Fidelity Total Bond Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					
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 Cash Reserves [BA]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Proceeds from sale of mutual funds					
Susan's Fidelity Roth IRA ⇒ Invesco FD TR II Solar ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					
Susan's Fidelity Roth IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: bought shares					
Susan's Fidelity Roth IRA ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Susan's Fidelity Roth IRA ⇒ SPDR S&P 500 ETF [EF]	SP	\$1 - \$1,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase shares					
Susan's TIAA-CREF Retirement Account ⇒ CREF Stock Fund [MF]	SP	\$50,001 - \$100,000	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 Joint Brokerage Account ⇒ Fidelity Short Term Bond Fund [MF]	JT	12/28/2022	P	\$1,001 - \$15,000	
Fidelity Joint Brokerage Account ⇒ SPDR S&P 500 ETF [EF]	JT	09/29/2022	P	\$1,001 - \$15,000	
Fidelity Joint Brokerage Account ⇒ Western Alliance Bank CD [BA]	JT	12/30/2022	P	\$50,001 - \$100,000	
Jared's Fidelity Rollover IRA ⇒ ALPS Clean Energy [MF]		12/27/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ American Bond Fund [MF]		12/27/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Baird Aggregate Bond Fund [MF]		12/23/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Fidelity Cash Reserves [BA]		12/19/2022	P	\$15,001 - \$50,000	
DESCRIPTION: Transfer proceeds from NRDC Pension buyout \$28,903.46					
Jared's Fidelity Rollover IRA ⇒ Fidelity Short Term Bond Fund [MF]		12/23/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF]		01/19/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ Invesco FD TR II Solar ETF [EF]		05/11/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		01/18/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		01/21/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		05/11/2022	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Jared's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]		12/27/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ SPDR S&P 500 ETF [EF]		05/16/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Rollover IRA ⇒ SPDR S&P 500 ETF [EF]		09/29/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Invesco FD TR II Solar ETF [EF]		01/18/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ Invesco FD TR II Solar ETF [EF]		01/21/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ SPDR S&P 500 ETF [EF]		05/12/2022	P	\$1,001 - \$15,000	
Jared's Fidelity Traditional IRA ⇒ SPDR S&P 500 ETF [EF]		09/29/2022	P	\$1,001 - \$15,000	
Susan's Fidelity Rollover IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]	SP	01/21/2022	P	\$1,001 - \$15,000	
Susan's Fidelity Roth IRA ⇒ Invesco FD TR II Solar ETF [EF]	SP	01/19/2022	P	\$1,001 - \$15,000	
Susan's Fidelity Roth IRA ⇒ Invesco FD TR II Solar ETF [EF]	SP	01/25/2022	P	\$1,001 - \$15,000	
Susan's Fidelity Roth IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]	SP	01/18/2022	P	\$1,001 - \$15,000	
Susan's Fidelity Roth IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]	SP	01/23/2022	P	\$1,001 - \$15,000	
Susan's Fidelity Roth IRA ⇒ INVESCO Wilder-Hill Clean Energy ETF [EF]	SP	01/25/2022	P	\$1,001 - \$15,000	
Susan's Fidelity Roth IRA ⇒ SPDR S&P 500 ETF [EF]	SP	05/11/2022	P	\$1,001 - \$15,000	

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<https://fd.house.gov/reference/asset-type-codes.aspx>.

### SCHEDULE C: EARNED INCOME

Source	Type	Amount
In Home Support Services wages	Spouse Income	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Nationstar Bank dba Mr. Cooper	September 2021	Mortgage on personal residence	\$100,001 - \$250,000
JT	The Money Source	September 2021	Mortgage on part time home in Washington DC	\$250,001 - \$500,000

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

None disclosed.

### 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

- 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 (closed)  
DESCRIPTION: Defined benefit pension account for work at Natural Resources Defense Council 2001-06. Accepted buyout in 2022 and transferred proceeds to Fidelity Rollover IRA.
- Jared's Roth IRA  
DESCRIPTION: Roth IRA owned by Jared Huffman
- Susan's CalSRTS Retirement (Owner: SP)  
DESCRIPTION: Susan's California Teachers Retirement Account
- Susan's Fidelity IRA-BDA (Owner: SP)
- Susan's Fidelity Rollover IRA (Owner: SP)
- Susan's Fidelity Roth IRA (Owner: SP)  
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 , 07/10/2023