



Filing ID #10015919

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Jimmy Panetta
Status: Member
State/District: CA20

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2016
Filing Date: 07/27/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alameda County Employees' Retirement Association Pension		Undetermined	None		
Alameda County Employees' Retirement Association Pension	SP	Undetermined	None		
American Funds CollegeAmerica 529 Savings Plan ⇒ Capital Income Builder	DC	\$1,001 - \$15,000	Tax-Deferred		
American Funds CollegeAmerica 529 Savings Plan ⇒ Capital World Bond Fund	DC	\$1 - \$1,000	Tax-Deferred		
American Funds CollegeAmerica 529 Savings Plan ⇒ Capital World Growth & Income	DC	\$1,001 - \$15,000	Tax-Deferred		
American Funds CollegeAmerica 529 Savings Plan ⇒ EuroPacific Growth Fund	DC	\$1,001 - \$15,000	Tax-Deferred		
American Funds CollegeAmerica 529 Savings	DC	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Plan ⇒ Fundamental Investors					
American Funds CollegeAmerica 529 Savings Plan ⇒ Growth Fund of America	DC	\$1,001 - \$15,000	Tax-Deferred		
American Funds CollegeAmerica 529 Savings Plan ⇒ Income Fund of America	DC	\$1,001 - \$15,000	Tax-Deferred		
American Funds CollegeAmerica 529 Savings Plan ⇒ Investment Company of America	DC	\$1,001 - \$15,000	Tax-Deferred		
American Funds CollegeAmerica 529 Savings Plan ⇒ New World Fund	DC	\$1,001 - \$15,000	Tax-Deferred		
American Funds CollegeAmerica 529 Savings Plan ⇒ SMALLCAP World Fund	DC	\$1,001 - \$15,000	Tax-Deferred		
American Funds CollegeAmerica 529 Savings Plan ⇒ The Bond Fund of America	DC	\$1,001 - \$15,000	Tax-Deferred		
Bank of America	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	None
CalPERS pension		Undetermined	None		
CalPERS Pension	SP	Undetermined	None		
Citigroup Global Markets, Inc. 529 Plan ⇒ Capital Income Builder	DC	\$1,001 - \$15,000	Tax-Deferred		
Citigroup Global Markets, Inc. 529 Plan ⇒ Capital World Bond Fund	DC	\$1 - \$1,000	Tax-Deferred		
Citigroup Global Markets, Inc. 529 Plan ⇒ Capital World Growth & Income	DC	\$1,001 - \$15,000	Tax-Deferred		
Citigroup Global Markets, Inc. 529 Plan ⇒ EuroPacific Growth Fund	DC	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Citigroup Global Markets, Inc. 529 Plan ⇒ Fundamental Investors	DC	\$1,001 - \$15,000	Tax-Deferred		
Citigroup Global Markets, Inc. 529 Plan ⇒ Growth Fund of America	DC	\$1,001 - \$15,000	Tax-Deferred		
Citigroup Global Markets, Inc. 529 Plan ⇒ Income Fund of America	DC	\$1,001 - \$15,000	Tax-Deferred		
Citigroup Global Markets, Inc. 529 Plan ⇒ Investment Company of America	DC	\$1,001 - \$15,000	Tax-Deferred		
Citigroup Global Markets, Inc. 529 Plan ⇒ New World Fund	DC	\$1,001 - \$15,000	Tax-Deferred		
Citigroup Global Markets, Inc. 529 Plan ⇒ SMALLCAP World Fund	DC	\$1,001 - \$15,000	Tax-Deferred		
Citigroup Global Markets, Inc. 529 Plan ⇒ The Bond Fund of America	DC	\$1,001 - \$15,000	Tax-Deferred		
Janus IRA ⇒ Janus Global Life Sciences Fund D Shares	SP	\$15,001 - \$50,000	Tax-Deferred		
Janus IRA ⇒ Janus Global Select Fund D Shares	SP	\$15,001 - \$50,000	Tax-Deferred		
Janus IRA ⇒ Janus Research Fund D Shares	SP	\$15,001 - \$50,000	Tax-Deferred		

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
State of California	Spouse Salary	N/A	N/A
Monterey County Superior Court	Spouse Salary	N/A	N/A
Monterey County	Salary		\$141,199.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Nelnet	June 1996	student loan	\$50,001 - \$100,000
JT	Citibank	December 2013	Mortgage Personal Residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Veterans Transition Center Advisory Council
COMMENTS: Uncompensated	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 1997	Myself and County of Alameda, CA	Participation in pension
March 2010	Myself and County of Monterey, CA	Participation in pension

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">o American Funds CollegeAmerica 529 Savings Plan (Owner: DC) LOCATION: CAo Citigroup Global Markets, Inc. 529 Plan (Owner: DC) LOCATION: CAo Janus IRA (Owner: SP)
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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: Hon. Jimmy Panetta , 07/27/2017