



Filing ID #10066636

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Zoe Lofgren
Status: Member
State/District: CA18

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 05/09/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
California Public Employee Retirement System [DB]		Undetermined	None		<input type="checkbox"/>
Deskworks Inc. [PS] DESCRIPTION: Software company	SP	\$100,001 - \$250,000	Capital Gains	\$100,001 - \$1,000,000	<input type="checkbox"/>
First Citizens Bank [BA] DESCRIPTION: Formerly Silicon Valley Bank.	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
John Marshall Collins PC, 100% Interest [OL] LOCATION: San Jose, CA, US DESCRIPTION: Law firm.	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Residential Rental Property [RP] LOCATION: San Jose, CA, US	JT	\$1,000,001 - \$5,000,000	Rent	\$201 - \$1,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ California State Public Works Board Lease Revenue Bonds, Ser. D [GS]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒	JT	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Eventide Gilead Fund Institutional Class (ETILX) [MF]					
Collins/Lofgren Family Trust ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ FlexShares Global Upstream Natural Resources Index Fund ETF (GUNR) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ iShares Trust iShares Global REIT ETF (REET) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<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 ⇒ ProShares DJ Brookfield Global Infrastructure ETF (TOLZ) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ SPDR Nuveen Bloomberg High Yield Municipal Bond ETF (HYMB) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ TCW Transform 500 ETF (VOTE) [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Collins/Lofgren Family Trust ⇒ United State Treasury Bills [GS]	JT	None	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Redeemed in 2024.					
Collins/Lofgren Family Trust ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity 457 Deferred Compensation ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Fidelity Contrafund K6 (FLCNX) [MF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ MissionSquare PLUS R13 Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX) [MF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIIIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ FlexShares Global Upstream Natural Resources Index Fund ETF (GUNR) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ iShares iBoxx \$ High Yield Corporate Bond ETF (HYG) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
John Marshall Collins Rollover IRA ⇒ iShares Preferred and Income Securities ETF (PFF) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ iShares Trust iShares Global REIT ETF (REET) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ ProShares DJ Brookfield Global Infrastructure ETF (TOLZ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
John Marshall Collins Rollover IRA ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Zoe Lofgren Trad IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Zoe Lofgren Trad IRA ⇒ iShares Intermediate Government/Credit Bond ETF (GVI) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Zoe Lofgren Trad IRA ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Zoe Lofgren Trad IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
John Marshall Collins Rollover IRA ⇒ Eventide Gilead Fund Institutional Class (ETILX) [MF]	SP	08/09/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ EuroPacific Growth Fund Cl R-6 (REGX) [MF]		12/03/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒		12/03/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Contrafund K6 (FLCNX) [MF]			(partial)		<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ MissionSquare PLUS R13 Fund [OT]		12/03/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: Mutual fund					
Fidelity 457 Deferred Compensation ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX) [MF]		12/03/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIIIX) [MF]		12/03/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIIIX) [MF]		12/30/2024	P	\$1,001 - \$15,000	
Fidelity 457 Deferred Compensation ⇒ EuroPacific Growth Fund CI R-6 (RERGX) [MF]		12/19/2024	P	\$1,001 - \$15,000	
Fidelity 457 Deferred Compensation ⇒ EuroPacific Growth Fund CI R-6 (RERGX) [MF]		06/10/2024	P	\$1,001 - \$15,000	

* 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
John Marshall Collins PC	spouse salary	N/A
John Marshall Collins Rollover IRA	distribution	N/A
Zoe Lofgren Trad IRA	distribution	\$596.00
Fidelity 457 Deferred Compensation	distribution	\$23,163.00
California Public Employee Retirement System	distribution	\$50,375.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Silicon Valley Bank	January 2022	Mortgage on personal residence, San Jose, CA	\$250,001 - \$500,000

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

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Aspen Institute, Inc. (Congressional Program)	05/25/2024	06/01/2024	San Francisco, CA - Sydney, Australia - Canberra, Australia - San Francisco, CA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Collins/Lofgren Family Trust (Owner: JT)
- John Marshall Collins Rollover IRA (Owner: SP)
- Fidelity 457 Deferred Compensation
- 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 , 05/09/2025