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Rep. Zoe Lofgren (D-CA)

House · Democrat (most recent term) · CA-18 · in Congress 1995–present ·
Bioguide ID L000397

Party history: D 1995–present. Source: term data in unitedstates/congress-legislators (CC0);
party shown is as recorded per term there.

Estimated net worth (from public disclosures)

Estimate	Report year	Low	Mid	High
(a) Estimated net worth at the earliest available report (2013); the member entered office earlier, in 1995	2013	\$64,044	\$1,262,021	\$2,459,998
(b) Latest net worth estimate	2025	\$2,266,025	\$5,478,512	\$8,690,999
(c) Estimated gain / loss, nominal dollars, 2013 → 2025 (12 years spanned)	2013– 2025	–\$193,973	+ \$4,216,491	+ \$8,626,955

Gain Low = latest Low – earliest High; Gain High = latest High – earliest Low (widest possible spread); Mid = latest Mid – earliest Mid.

Reliability flags (net worth): 2025: 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket. **Included in the recommended dollar-gain ranking.**

Net worth by report year (mid; Low–High)

Report year	Assets (mid)	Liabilities (mid)	Net worth mid	Low ... High	Status / flags
2013	\$2,012,022	\$750,001	\$1,262,021	\$64,044 ... \$2,459,998	computed
2014	\$2,603,022	\$750,001	\$1,853,022	\$491,045 ... \$3,214,998	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2015	\$3,219,022	\$750,001	\$2,469,021	\$918,044 ... \$4,019,998	computed
2016	\$3,465,020	\$750,001	\$2,715,020	\$1,105,041 ... \$4,324,998	computed

2017	\$3,866,054	\$1,500,002	\$2,366,052	\$91,107 ... \$4,640,997	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2018	\$3,844,546	\$750,000	\$3,094,546	\$1,143,093 ... \$5,045,999	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2019	\$3,460,054	\$750,000	\$2,710,053	\$770,107 ... \$4,649,999	computed
2020	\$3,385,019	\$750,000	\$2,635,018	\$995,038 ... \$4,274,999	computed
2021	\$3,590,561	\$750,000	\$2,840,560	\$755,122 ... \$4,925,999	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2022	\$3,921,562	\$750,001	\$3,171,562	\$1,015,125 ... \$5,327,998	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2023	\$5,446,022	\$375,000	\$5,071,022	\$1,865,044 ... \$8,276,999	computed
2024	\$5,577,020	\$375,000	\$5,202,020	\$1,944,040 ... \$8,459,999	computed
2025	\$5,853,512	\$375,000	\$5,478,512	\$2,266,025 ... \$8,690,999	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket

- **What this is:** Net worth = Schedule A assets (each value range at its midpoint; low–high range shown) minus Schedule D liabilities (midpoints / ranges). **Low** = assets at range floors minus liabilities at range ceilings; **Mid** = midpoints; **High** = assets at ceilings minus liabilities at floors. Low and High are outer bounds of the reported ranges, not likely outcomes.
- **What it excludes / understates:** exact values (only ranges are reported); a **personal residence is not reported as an asset** (although a mortgage on it may be listed as a liability, which then lowers the estimate); retirement and federal accounts (e.g. Thrift Savings Plan, defined-benefit pensions) are only partly or not reported; assets of excepted/blind trusts, cash held below reporting thresholds, vehicles, household goods and most spouse/dependent items exempt from reporting are not included; liabilities on a personal residence, revolving credit under thresholds and loans to family may be omitted by filers.
- **Open-ended top ranges** (e.g. "Over \$50,000,000") are counted at their **lower bound** and flagged, so such values are understated.
- The change is a change in **estimated net worth in nominal dollars** (no inflation adjustment). It includes salary, gifts, inheritances, business income and re-valuation as well as investment results, and it is subject to range-bracket noise; it is **not** an investment return and implies nothing about conduct.

Read this first. Members report asset values only as *ranges* (e.g. "\$15,001 – \$50,000"), never exact dollars. Every figure below is an **estimate** computed from range midpoints, not a measured return. Figures cannot be interpreted as investment performance, and they do not show wrongdoing or skill. Methodology and limitations are at the end and in the project README. Sources: public financial disclosure reports filed with the Clerk of the U.S. House of Representatives and/or the Secretary of the Senate (Senate eFD), linked below.

AVG. ANNUAL
CHANGE
(GEOMETRIC, EST.)

+4.5%

SIMPLE AVERAGE OF
YEARS

+7.2%

YEARS ESTIMATED

11

BEST / WORST
SINGLE YEAR

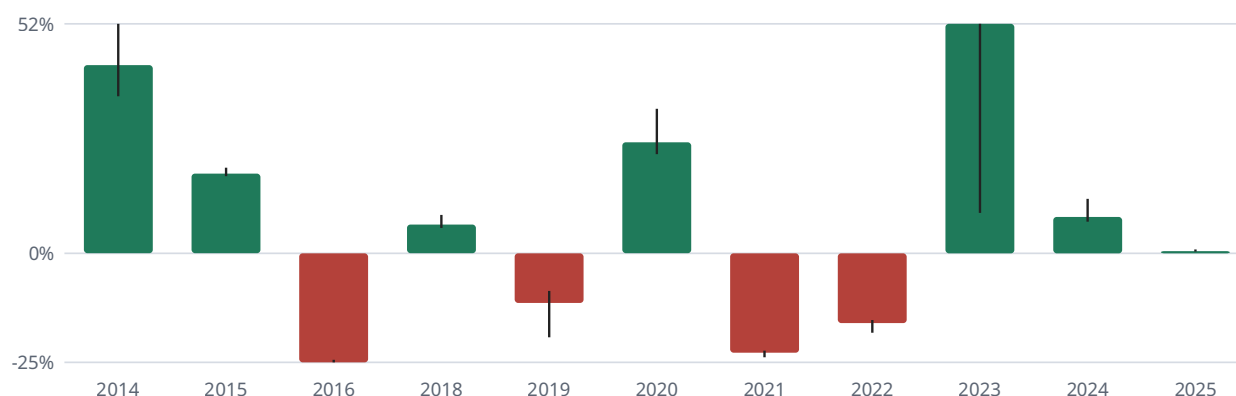
2023 +52%

2016 -25%

Reliability flags: 5/11 years trading-dominated; 1 year(s) driven by income/one position/range artefact; 6 unparsed value(s).

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +2.5% to +4.9%. This band is narrow because it moves both years together; the true uncertainty is larger — see the per-year "strict envelope" column and the limitations.

Estimated year-over-year change



Bars: midpoint estimate; whisker: same-position floor/ceiling band. Axis clipped to -100%...+150%. Years with insufficient traceable holdings are omitted.

Year (t-1 → t)	Opening value (mid)	Closing value (mid)	Income (mid)	Buys (mid)	Sales (mid)	Est. gain	Same-position band	Strict envelope	Traced coverage	Status flags
2013→2014	\$1,364,018	\$1,955,018	\$31,064	\$64,004	\$24,002	+42.7%	+35.6% ... +63.8%	-76% ... +161%	68%	count
2014→2015	\$2,253,022	\$2,431,518	\$41,768	\$32,500	\$219,004	+18.1%	+17.5% ... +19.4%	-76% ... +112%	93%	count

2015→2016	\$2,938,520	\$2,959,516	\$2,103	\$790,502	\$40,501	-24.7%	-26.1% ... -24.2%	-114% ... +64%	91%	count
2016→2017	\$456,002	\$1,871,043	\$1,201	\$1,462,543	\$16,001	-6.6%	-9.0% ... -1.3%	-466% ... +453%	13%	exclud not eligibl traced covera 13% < 60%; turnov (buys- > 100% openin value) many exited positio
2017→2018	\$2,737,047	\$2,814,542	\$12,352	\$8,000	\$96,006	+6.5%	+5.7% ... +8.7%	-94% ... +107%	88%	count
2018→2019	\$2,439,041	\$2,188,547	\$10,601	\$405,010	\$370,507	-11.3%	-19.1% ... -8.5%	-127% ... +104%	79%	count many exited positio
2019→2020	\$3,379,550	\$3,352,518	\$21,202	\$32,002	\$888,030	+25.2%	+22.5% ... +32.8%	-81% ... +131%	98%	count many exited positio
2020→2021	\$2,819,516	\$2,294,020	\$10,601	\$128,008	\$8,000	-22.5%	-23.6% ... -22.1%	-103% ... +58%	83%	count many exited positio
2021→2022	\$2,810,056	\$2,343,053	\$6,102	\$8,000	\$24,002	-15.8%	-18.0% ... -15.2%	-114% ... +82%	82%	count
2022→2023	\$3,225,552	\$5,047,520	\$20,306	\$1,046,016	\$882,548	+52.0%	+9.2% ... +66.6%	-125% ... +230%	86%	count many exited positio single positio drives result (range jump)

2023→2024	\$4,829,518	\$5,162,018	\$33,258	\$24,002	\$56,502	+8.2%	+7.2% ... +12.3%	-113% ... +129%	89%	count
2024→2025	\$5,296,518	\$5,462,511	\$23,553	\$896,004	\$732,012	+0.5%	+0.4% ... +0.9%	-125% ... +126%	95%	count many exited positio

Filings used

Each annual-report year uses one filing (most recently filed version among originals/amendments whose Schedule A row count is $\geq 40\%$ of the largest). Electronic (text) PDFs are parsed. Scanned/image-only filings are OCR-read and used **only** if they pass the explicit validation gates described in the project README (value/income coverage, two-engine agreement, exact bracket snapping, page completeness, year-to-year position continuity); such years are labelled **OCR-derived** below. Scanned filings that fail validation are listed as “insufficient data – scanned”.

Report year	Doc ID	Type	Filed	Schedule A rows	Rows with unparsed value	Source (official filing) / SHA-256
2013	10000635	House annual	5/14/2014	48	0	10000635.pdf 808882260782b81f349f67263 65648d537f4d67eca86615e08 d6a8f31c0dd497
2014	10005391	House annual	5/14/2015	46	1	10005391.pdf 0dd2d8ca0ae9fe6b176ea64d8 d66217fa7230f15f5afcdfc72 3c45e06b5b4775
2015	10009952	House annual	5/16/2016	52	0	10009952.pdf 4cf0420d6a29f1617c3b6d607 49750531b90433c73096d2cf9 d1b159ceb5e473
2016	10015405	House annual	5/15/2017	51	0	10015405.pdf c81110005eb18c09843266e68 684b4bc698407b07425764ba bb99dddb54538be
2017	10020639	House annual	7/10/2018	110	1	10020639.pdf 9b8646b27ad64d9aa59fabf44 2a7ac2541c312e2c8a7b640a a6ff4e187d37e4a
2018	10026122	House annual	6/14/2019	95	1	10026122.pdf 4436f89a2c87c658627ae99c d54a29d968b1d90dffbe0b9f1 bdf58adc054975

2019	10037242	House amendment	7/27/2020	110	0	10037242.pdf de806ae135fcfb5b50e3d5f8b5f765f2350cf410fabb78fa7b6ba0c82f025f4f
2020	10040456	House annual	8/4/2021	44	0	10040456.pdf 4e9d88d4d5523b0730714e55bf659f8dae3ec44ce2906b53afae89160217212d
2021	10046892	House annual	8/11/2022	128	1	10046892.pdf 7c0cc95a4952aeb2e8f0df85a7182e4d95d1d3e452e5dd8e90b3d9fa32857d09
2022	10051323	House annual	8/10/2023	127	1	10051323.pdf 0bde70035d4507c8ee1282170668954283b18287748ddd6bfe2a525edf04d847
2023	10067616	House amendment	8/10/2026	68	0	10067616.pdf 015f949a2adf4b61080fa4b982746aa772cd062983d301e1d5514e4a68354119
2024	10066636	House annual	5/9/2025	41	0	10066636.pdf 4c74f4082c1552e65345a632012407f72fca64052e386653ecaf4730d4a18ee1
2025	10074949	House annual	8/10/2026	36	1	10074949.pdf 5d467e14306bb3b8c8846f2ceba81b1321d214798cc1dd791f27e75fbc11fc6c

Largest movers 2022→2023

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Residential Rental Property [RP]	JT	held	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$0	\$0
Satellite Telework Centers [PS]	SP	held	\$250,001 - \$500,000	\$1 - \$1,000	\$0	\$0
Collins/Lofgren Family Trust ⇒ Cash Sweep [BA]	JT	held	\$100,001 - \$250,000	None	\$0	\$0
Silicon Valley Bank [BA]	JT	held	\$100,001 - \$250,000	\$50,001 - \$100,000	\$0	\$0

John Marshall Collins Rollover IRA ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	SP	new	—	\$50,001 - \$100,000	\$32,500	\$0
John Marshall Collins Rollover IRA ⇒	SP	held	\$1,001 - \$15,000	None	\$0	\$48,502
John Marshall Collins Rollover IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	new	—	\$100,001 - \$250,000	\$175,000	\$32,500
John Marshall Collins Rollover IRA ⇒ Bank of America Corporation (BAC) [ST]	SP	exited	\$1,001 - \$15,000	—	\$0	\$40,501

Largest movers 2023→2024

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
John Marshall Collins Rollover IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Collins/Lofgren Family Trust ⇒ United State Treasury Bills [GS]	JT	held	\$100,001 - \$250,000	None	\$0	\$0
Collins/Lofgren Family Trust ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]	JT	held	\$1,001 - \$15,000	\$100,001 - \$250,000	\$0	\$0
Collins/Lofgren Family Trust ⇒ TCW Transform 500 ETF (VOTE) [EF]	JT	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0
Fidelity 457 Deferred Compensation ⇒ Vanguard Institutional Index Fund Institutional Plus	—	new	—	\$50,001 - \$100,000	\$8,000	\$8,000
Fidelity 457 Deferred Compensation ⇒ EuroPacific Growth Fund CI R-6 (RERGX) [MF]	—	new	—	\$50,001 - \$100,000	\$16,001	\$8,000
John Marshall Collins PC, 100% Interest [OL]	SP	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0
John Marshall Collins Rollover IRA ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]	SP	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$0

Largest movers 2024→2025

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
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Collins/Lofgren Family Trust ⇒ Fidelity Government Cash Reserves (FDRXX) [BA]	JT	held	\$100,001 - \$250,000	\$1,001 - \$15,000	\$0	\$0
First Citizens Bank [BA]	JT	held	\$15,001 - \$50,000	\$100,001 - \$250,000	\$0	\$0
John Marshall Collins Rollover IRA ⇒ TCW Transform 500 ETF (VOTE) [EF]	SP	held	\$250,001 - \$500,000	\$250,001 - \$500,000	\$32,500	\$0
Collins/Lofgren Family Trust ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	JT	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$8,000	\$0
Collins/Lofgren Family Trust ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF]	JT	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$32,500	\$0
Fidelity 457 Deferred Compensation ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX)	—	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$8,000
Fidelity 457 Deferred Compensation ⇒ MissionSquare PLUS R13 Fund [MF]	—	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$8,000
Collins/Lofgren Family Trust ⇒ SPDR Nuveen Bloomberg High Yield Municipal Bond ETF (HYMB)	JT	held	\$1,001 - \$15,000	None	\$0	\$0

Method (summary)

1. Schedule A asset rows are read from each annual report; the dollar range for each row is converted to its midpoint. Open-ended top ranges ("Over \$50,000,000") are excluded from the traced set and counted as a coverage loss.
2. Positions are matched year to year by owner code (self/SP/DC/JT) + normalised asset name. A position that appears only in year t is included only if Schedule B shows a purchase of it in year t (opening value 0); a position that disappears is included only if Schedule B shows a sale (closing value 0). Otherwise it is excluded as unexplained.
3. Estimated gain = (closing – opening + reported income – purchases + sale proceeds) ÷ opening, all at midpoints, for the traced positions. "Capital gains" income is not added again (it is already in value change and sale proceeds).
4. A year counts only if traced opening value ≥ \$50,000 and traced coverage ≥ 60% of the opening midpoint. A member is ranked only with ≥ 3 such years (exactly 2 = "limited data", shown but unranked). Average = geometric mean of (1+yearly estimate).

Limitations

- Ranges are wide (up to a factor of 5 or more, and up to \$50M+ open-ended); a holding can move between ranges without any real change in value, and stay in a range while moving materially. Yearly estimates are therefore noisy; the "strict envelope" shows the mathematical worst/best case and is typically wider than ±100%.

- Purchases and sales are only disclosed as ranges and only for transactions over \$1,000; partial sales, dividend reinvestment, spousal/dependent accounts and retirement-plan funds are reported inconsistently. Excepted/ blind trusts, personal residences and certain pensions are not reported at all.
- Filers sometimes change how they list assets (e.g. listing a brokerage account vs. its individual holdings), which can make positions untraceable across years; these are excluded rather than guessed.
- Asset values in an annual report are as of Dec 31 of the reporting year; the report year $t-1 \rightarrow t$ covers that calendar year. Late or amended filings are used when filed; extensions can delay them.
- The text of these reports is machine-parsed from PDFs; parse errors are possible. Every number links back to the cited filing. This is not investment advice.
- Use of these filings is restricted by 5 U.S.C. § 105(c) (no unlawful, commercial or credit-rating purpose, and none for solicitation of money).

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Figures are estimates derived from value ranges reported in public financial disclosures; they are not exact values and are not financial advice.