



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Donald John Bacon  
**Status:** Member  
**State/District:** NE02

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 08/4/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Athene Life Insurance (Whole) [WU]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Athene Life Insurance (Whole) [WU]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
COBALT Federal Credit Union [BA]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Franklin Mutual Shares fund - Class A ⇒ Franklin Mutual Shares Fund--Class A [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Ivy Investments Cap Growth Fund A 667 ⇒ Ivy Investments Cap Growth Fund A 667 [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Ivy Investments Science and Tech A 608 ⇒ Ivy Investments Science and Tech A 608 [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: .					
Principle ⇒ Principle Investments (Prin Life Time 2030 Inst Fund) [DB]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Pension Plan with University of Bellevue					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Prudential PruLife UL Protector ⇒ Prudential Life Insurance (Universal) [WU]		\$250,001 - \$500,000	None		<input type="checkbox"/>
USAA 529 College Savings Plan ⇒ USAA College Fund [5P]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: NV DESCRIPTION: College fund for my granddaughter Hadley Bacon					
Wells Fargo Checking and Savings [BA]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Under my wife's name for real estate.					
Wells Fargo Checking and Savings [BA]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: My wife, Angie, has her name jointly on her Dad's account (Earnest Hardison) so she can help him pay bills.					
Wells Fargo Checking and Savings [BA]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Joint checking and savings account					

\* 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

None disclosed.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount
Nebraska Realty	Spouse's Commission	\$7,200.00

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Vice President COMMENTS: Uncompensated	Local Chapter of Air Force Association
Chaplain COMMENTS: Uncompensated	Local Chapter of the Military Officers of America Association

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2014	Myself and University of Bellevue	Continued participation in pension plan. I don't contribute to it any more, but the pension is saved.

## 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

- Franklin Mutual Shares fund - Class A  
DESCRIPTION: My IRA
- Ivy Investments Cap Growth Fund A 667 (Owner: SP)  
DESCRIPTION: Angela Bacon's IRA
- Ivy Investments Science and Tech A 608  
DESCRIPTION: IRA for Don Bacon
- Principle  
DESCRIPTION: Bellevue University Retirement Plan
- Prudential PruLife UL Protector  
DESCRIPTION: Life insurance on myself
- USAA 529 College Savings Plan (Owner: JT)  
LOCATION: NV  
DESCRIPTION: 529 Fund is for our granddaughter, Hadley Bacon

## 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. Donald John Bacon , 08/4/2021