



Filing ID #10059759

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 05/10/2024

## 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]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
COBALT Federal Credit Union [BA]	JT	\$250,001 - \$500,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: The added money was from land sale of my father-in-law's estate. We will use this money in our final mortgage loan.					
Franklin Mutual Shares fund - Class A ⇒ Franklin Mutual Shares Fund--Class A [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Hay Field [FA]	JT	\$250,001 - \$500,000	Rent	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Papillion, NE, US DESCRIPTION: Neighbor bails the hay from our property. Tyler Krapp Farms pays for the hay.					
LPL Financial ⇒ LPL Financial WSTAX Delaware Ivy Science and Tech CL A [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: .					
LPL Financial ⇒		\$100,001 -	Capital Gains	\$15,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
WLGAX Delaware Ivy Large Cap Growth Cl A [MF]		\$250,000		\$50,000	<input type="checkbox"/>
Principle ⇒ Principle Investments (Prin Life Time 2030 Inst Fund) [PE]  DESCRIPTION: Pension Plan with University of Bellevue		\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
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]  LOCATION: NV DESCRIPTION: The fund is divided up between age-based option moderate portfolio, aggressive growth portfolio, growth portfolio and moderately aggressive portfolio.	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Wells Fargo Checking and Savings [BA]  DESCRIPTION: My wife, Angie, has her name jointly on her Dad's account (Earnest Hardison) so she can help him pay bills. He passed away this last December and the funds are being divided between the siblings.	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Checking and Savings [BA]  DESCRIPTION: Joint checking and savings account	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<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?
Ernest Hardison Farm [RP]  LOCATION: Greenville, KY, US DESCRIPTION: We sold my father-in-law's farm. We intend to use the proceeds for downpayment on new home in Papillion.	JT	05/18/2023	S	\$500,001 - \$1,000,000	<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 C: EARNED INCOME

Source	Type	Amount
Nebraska Realty	Spouse's Commission	\$8,157.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Foundation One Bank	July 2021	Building loan for future house to include land and construction	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Chaplain COMMENTS: Uncompensated	Local Chapter of the Military Officers of America Association
Board of Visitors	Air Force Academy
Board Member	U.S. Holocaust Museum
Board Member	Congressional Office of International Leadership

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2014	Myself and University of Bellevue	This was a pension plan when I was with University of Bellevue. I no longer contribute to it, but the pension is saved.

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?
Republican Mainstreet	03/31/2023	04/6/2023	Washington D.C. - Aman, Jordan - Papillion, Nebraska	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ripon Society	08/6/2023	08/11/2023	Omaha - London, England - Omaha	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
United Nations Foundation	10/22/2023	10/23/2023	Washington D.C. - New York - Washington D.C.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Franklin Mutual Shares fund - Class A  
DESCRIPTION: My IRA
- LPL Financial
- 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 J. Bacon , 05/10/2024