Filing ID #10067525

Financial Disclosure Report

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Filer Information

Name: Hon. James A. Himes
Status: Member
State/District: CT04

Filing Information

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 06/24/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
American Express Savings [BA]	JT	$1,000,001 - $5,000,000	Interest	$15,001 - $50,000	☐
Chase Savings Account [BA]	DC	$1,001 - $15,000	Interest	$1 - $200	☐
Chase Savings Account [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	☐
Chase Workplace Checking [BA]	JT	$50,001 - $100,000	Interest	$1 - $200	☐
Empower Aggressive Profile Fund [IH]		$100,001 - $250,000	Tax-Deferred		☐
Principal Bank Safe Harbor IRA [IH]		$1,001 - $15,000	Tax-Deferred		☐
DC2 ⇒ CT Moderate Growth [5F] Location: CT	DC	None	Tax-Deferred		☐
DC2 ⇒ CT Stable Value Portfolio (-) [5F] Location: CT	DC	None	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity Brokerage ⇒ Columbia Contrarian Core Fund [EF]	JT	$100,001 - $250,000	Capital Gains, Dividends	$5,001 - $15,000	☐
Fidelity Brokerage ⇒ Fidelity 2022 Private Equity Multi Strategy [HE]	JT	$100,001 - $250,000	None		☑
Fidelity Brokerage ⇒ Fidelity Capital Appreciation [EF]	JT	$250,001 - $500,000	Capital Gains, Dividends	$15,001 - $50,000	☐
Fidelity Brokerage ⇒ Fidelity Government Money Market [EF]	JT	$250,001 - $500,000	Interest	$15,001 - $50,000	☐
Fidelity Brokerage ⇒ Fidelity International Discovery [EF]	JT	$250,001 - $500,000	Capital Gains, Dividends	$5,001 - $15,000	☐
Fidelity Brokerage ⇒ Fidelity International Small Cap [EF]	JT	$100,001 - $250,000	Capital Gains, Dividends	$2,501 - $5,000	☐
Fidelity Brokerage ⇒ Fidelity Intl Cap Appreciation [EF]	JT	$250,001 - $500,000	Capital Gains, Dividends	$5,001 - $15,000	☐
Fidelity Brokerage ⇒ Fidelity Intl Real Estate Fund [EF]	JT	$15,001 - $50,000	Dividends	$1,001 - $2,500	☐
Fidelity Brokerage ⇒ Fidelity Pacific Basin [EF]	JT	$50,001 - $100,000	Dividends, Interest	$2,501 - $5,000	☐
Fidelity Brokerage ⇒ Fidelity Total Mkt Index FID Advantage [EF]	JT	$1,000,001 - $5,000,000	Capital Gains, Dividends	$15,001 - $50,000	☐
Fidelity Brokerage ⇒ GS Small Cap Value [EF]	JT	$100,001 - $250,000	Capital Gains, Dividends	$15,001 - $50,000	☐
Fidelity Brokerage ⇒ IShares S&P 500 [EF]	JT	$1,000,001 - $5,000,000	Capital Gains, Dividends	$5,001 - $15,000	☐
Fidelity Brokerage ⇒ Microsoft Corporation (MSFT) [ST]	JT	$100,001 - $250,000	Capital Gains, Dividends	$1,001 - $2,500	☐
Fidelity Brokerage ⇒ Vanguard Information Technology ETF [EF]	JT	$100,001 - $250,000	Dividends	$1,001 - $2,500	☐
Fidelity Rollover IRA ⇒		$100,001 -	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity Blue Chip Value [EF]		$250,000			
Fidelity Rollover IRA ⇒ Fidelity Capital & Income [EF]		$100,001 - $250,000	Tax-Deferred		
Fidelity Rollover IRA ⇒ Fidelity Growth Strategies Fund [EF]		$250,001 - $500,000	Tax-Deferred		
Fidelity Rollover IRA ⇒ Fidelity Intl Cap Appreciation [EF]		$100,001 - $250,000	Tax-Deferred		
Fidelity Rollover IRA ⇒ Fidelity Real Estate Income [EF]		$100,001 - $250,000	Tax-Deferred		
Fidelity Rollover IRA ⇒ Fidelity Total Bond [EF]		$50,001 - $100,000	Tax-Deferred		
Fidelity Rollover IRA ⇒ Fidelity Total Mkt Index FID Advantage [EF]		$100,001 - $250,000	Tax-Deferred		
Fidelity Rollover IRA ⇒ Fidelity Value Discovery [EF]		$250,001 - $500,000	Tax-Deferred		
Fidelity Rollover IRA ⇒ Hennessy Cornerstone Growth Inv [EF]		$50,001 - $100,000	Tax-Deferred		
Fidelity Self-Employed 401(k) ⇒ Columbia Select Large Cap Equity [EF]		$50,001 - $100,000	Tax-Deferred		
Fidelity Self-Employed 401(k) ⇒ Fidelity Blue Chip Value [EF]		$1,001 - $15,000	Tax-Deferred		
Fidelity Self-Employed 401(k) ⇒ Fidelity Cash Reserves [BA]		$1 - $1,000	Tax-Deferred		
Fidelity Self-Employed 401(k) ⇒ Fidelity Fund [EF]		$50,001 - $100,000	Tax-Deferred		
Spouse IRA ⇒ Fidelity Magellan [MF]	SP	$100,001 - $250,000	Tax-Deferred		

* 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?
Fidelity Brokerage ⇒ Fidelity 2022 Private Equity Multi Strategy [HE]	JT	10/15/2024	P	$15,001 - $50,000	
Fidelity Brokerage ⇒ Fidelity 2022 Private Equity Multi Strategy [HE]	JT	07/09/2024	P	$1,001 - $15,000	
Fidelity Self-Employed 401(k) ⇒ Columbia Select Large Cap Equity Fund Class I (NSEPX) [MF] Description: Reinvestment, tax deferred		06/14/2024	P	$1,001 - $15,000	
Fidelity Rollover IRA ⇒ Fidelity Real Estate Income (FRIFX) [MF] Description: Reinvestment, tax deferred		07/05/2024	P	$1,001 - $15,000	
Fidelity Brokerage ⇒ Fidelity 2022 Private Equity Multi Strategy [HE]	JT	04/12/2024	P	$15,001 - $50,000	
Fidelity Brokerage ⇒ Fidelity 2022 Private Equity Multi Strategy [HE]	JT	01/16/2024	P	$15,001 - $50,000	
Fidelity Rollover IRA ⇒ Fidelity Blue Chip Value (FBCVX) [MF] Description: Reinvestment, tax deferred		09/13/2024	P	$1,001 - $15,000	
Fidelity Rollover IRA ⇒ Fidelity Value Discovery (FVDFX) [MF] Description: Reinvestment, tax deferred		09/13/2024	P	$1,001 - $15,000	
Fidelity Rollover IRA ⇒ Fidelity Real Estate Income (FRIFX) [MF] Description: Reinvestment, tax deferred		10/04/2024	P	$1,001 - $15,000	
Fidelity Rollover IRA ⇒ Hennessy Cornerstone Growth Fund Inv Cl (HFCGX) [MF] Description: Reinvestment, tax deferred		12/05/2024	P	$1,001 - $15,000	
Fidelity Rollover IRA ⇒ Fidelity International Capital Appreciation K6 Fund (FAPCX) [MF] Description: Reinvestment, tax deferred		12/13/2024	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Fidelity Rollover IRA ⇒ Fidelity Blue Chip Value (FBCVX) [MF] Description: Reinvestment, tax deferred		12/20/2024	P	$1,001 - $15,000	
Fidelity Rollover IRA ⇒ Fidelity Real Estate Income (FRIFX) [MF] Description: Reinvestment, tax deferred		12/20/2024	P	$1,001 - $15,000	
Fidelity Rollover IRA ⇒ Fidelity Total Market Index Fund (FSKAX) [MF] Description: Reinvestment, tax deferred		12/20/2024	P	$1,001 - $15,000	
Spouse IRA ⇒ Fidelity Magellan (FMAGX) [MF] Description: Reinvestment, tax-deferred	SP	12/06/2024	P	$1,001 - $15,000	
Spouse IRA ⇒ Fidelity Magellan (FMAGX) [MF] Description: Reinvestment, tax-deferred	SP	05/10/2024	P	$1,001 - $15,000	
Fidelity Self-Employed 401(k) ⇒ Columbia Select Large Cap Equity Fund Class S (NSEAX) [MF] Description: Reinvestment, tax-deferred		12/06/2024	P	$1,001 - $15,000	
Fidelity Rollover IRA ⇒ Fidelity Value Discovery (FVDFX) [MF] Description: Reinvestment, tax deferred		12/20/2024	P	$1,001 - $15,000	
Fidelity Rollover IRA ⇒ Fidelity Growth Strategies Fund (FDEGX) [MF] Description: Reinvestment, tax deferred		12/26/2024	P	$15,001 - $50,000	
DC2 ⇒ CT Moderate Growth [5P] Location: CT	DC	12/19/2024	S	$1,001 - $15,000	✓
DC2 ⇒ CT Stable Value Portfolio [5P] Location: CT	DC	12/19/2024	S	$1,001 - $15,000	✓
DC2 ⇒ CT Moderate Growth [5P] Location: CT	DC	07/17/2024	S (partial)	$15,001 - $50,000	✓

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
DC2 ⇒ CT Stable Value Portfolio [5P] LOCATION: CT	DC	07/17/2024	S (partial)	$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

None disclosed.

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	JP Morgan Chase	October 1998	Mortgage on CT Residence	$100,001 - $250,000
JT	JP Morgan Chase	April 2021	Mortgage on DC residence	$500,001 - $1,000,000
JT	American Express	Year End Balance	Credit Card	$15,001 - $50,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

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?
Marshall Scholars Foundation	01/12/2024	01/16/2024	Washington, DC - London, UK - Washington, DC	0	✓	✓	✓
German Marshall Fund	02/19/2024	02/20/2024	Munich, Germany - Schloss Elmau,	0	✓	✓	

Trip Details					Inclusions		
Source	**Start Date**	**End Date**	**Itinerary**	**Days at Own Exp.**	**Lodging?**	**Food?**	**Family?**
			Germany - Washington, DC				
Aspen Institute	04/01/2024	04/06/2024	Washington, DC - Milan, Italy - Washington, DC	0	✓	✓	✓
Ripon Society/Franklin Center	11/07/2024	11/12/2024	Washington, DC - Vienna, Austria - Washington, DC	0	✓	✓	✓

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

- Spouse IRA (Owner: SP)
- Fidelity Self-Employed 401(k)
- Fidelity Rollover IRA
- Fidelity Brokerage (Owner: JT)
  Location: US
- DC2 (Owner: DC)
  Location: CT

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. James A. Himes , 06/24/2025