



FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Mitchell Berman
Status: Congressional Candidate
State/District: WI01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 12/09/2025
Period Covered: 01/01/2024– 11/10/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
3905 W 8 Mile Road (Home) [RP]		\$500,001 - \$1,000,000	Rent	\$2,501 - \$5,000	\$2,501 - \$5,000
LOCATION: Caledonia, Racine, WI, US DESCRIPTION: Farmland Rent (~20 acres)					
43rd Street Land [RP]		\$50,001 - \$100,000	Rent	\$2,501 - \$5,000	\$2,501 - \$5,000
LOCATION: Caledonia, Racine, WI, US DESCRIPTION: Farmland Rent (~20 acres)					
Silver [PM]		\$1,001 - \$15,000	None		
Edvest 529 ⇒ Large Cap Responsibility Equity Portfolio [5F]	DC	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: WI					
Edvest 529 ⇒ Large Cap Responsibility Equity Portfolio [5F]	DC	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: WI					
Edvest 529 ⇒ Large-Cap Stock Index Portfolio [5F]	DC	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: WI					
Edvest 529 ⇒ Large-Cap Stock Index Portfolio [5F]	DC	\$1,001 - \$15,000	Tax-Deferred		
LOCATION: WI					
Transamerica 403b ⇒ Baird Aggregate Bond Fund Institutional Class (BAGIX) [MF]		\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ Baird Aggregate Bond Instl [CS]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transamerica 403b ⇒ DFA International Small Company Portfolio (DFISX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ DFA International Small Company Portfolio (DFISX) [MF]		\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ Dodge & Cox Stock Fund - Class X (DOXGX) [MF]		\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ Dodge & Cox Stock Fund - Class X (DOXGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transamerica 403b ⇒ Hartford Schroders Emerging Markets Equity Fund (SEMTX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transamerica 403b ⇒ Hartford Schroders Emerging Markets Equity Fund (SEMTX) [MF]		\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ Hartford Strategic Income R6 [CS]	SP	\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ MFS Institutional Investors Trust - MFS Institutional International Eq (MIEIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transamerica 403b ⇒ MFS Institutional Investors Trust - MFS Institutional International Eq (MIEIX) [MF]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Transamerica 403b ⇒ PGIM Jennison Small Company Fund Class R6 (PJSQX) [MF]		\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ PGIM Jennison Small Company Fund Class R6 (PJSQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transamerica 403b ⇒ The Hartford Strategic Income Fund Class R6 (HSNVX) [MF]		\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ Vanguard Developed Markets Index Institutional Plus (VDIPX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ Vanguard Developed Markets Index Institutional Plus (VDIPX) [MF]		\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX) [MF]		\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ Vanguard Extended Market Index Fund Insti Plus (VEMPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transamerica 403b ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Transamerica 403b ⇒ Vanguard Institutional Index Fund Institutional Plus Shares (VIXX) [MF]		\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ Vanguard Real Estate Index Fund Institutional Shares (VGSNX) [MF]		\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒ Vanguard Real Estate Index Fund Institutional Shares (VGSNX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Transamerica 403b ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Russell 1000 Growth Index Fd Insti Cl (VRGWX) [MF]					
Transamerica 403b ⇒ Vanguard Russell 1000 Growth Index Fd Insti Cl (VRGWX) [MF]		\$1 - \$1,000	Tax-Deferred		
Vanguard ⇒ Vanguard Specialized Portfolios Health Care Fund (VGHGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard ⇒ Vanguard U.S. Growth Fund (VWUSX) [MF]	SP	\$1,001 - \$15,000	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 C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Ascension SE Wisconsin Hosp In	Spouse	\$101,775.00	\$30,844.00
Ascension SE Wisconsin Hosp In	Salary	\$27,421.00	N/A
Department of Veterans Affairs	Salary	\$84,468.00	\$145,488.00
Wilks Bros Farms	Farm Rental	\$6,682.50	\$6,682.50

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Educators Credit Union	March 2021	Home Mortgage	\$500,001 - \$1,000,000
	ERGO Bank	March 2024	Investment Land Purchase	\$250,001 - \$500,000
	J.P. Morgan Chase	January 2025	Credit Card Debt	\$15,001 - \$50,000
	Capital One	November 2024	Credit Card Debt	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Vanguard (Owner: SP)
DESCRIPTION: Jillian's Roth
- Edvest 529 (Owner: DC)
LOCATION: WI
DESCRIPTION: Josphine's 529
- Edvest 529 (Owner: DC)
LOCATION: WI
DESCRIPTION: Gabriella's 529
- Transamerica 403b (Owner: SP)
DESCRIPTION: Jillian's Work Retirement
- Transamerica 403b
DESCRIPTION: Mitchell's Work Retirement

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Mitchell Berman , 12/09/2025