



Filing ID #10074497

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Ed Case
Status: Member
State/District: HI01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 04/10/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alliant Credit Union [BA]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	☐
Amazon.com, Inc. (AMZN) [ST]		\$250,001 - \$500,000	None		☐
Apple Inc. (AAPL) [ST]		\$1,000,001 - \$5,000,000	Dividends	\$2,501 - \$5,000	☐
Employees' Retirement System of the State of Hawai'i [DB]		Undetermined	Pension	\$15,001 - \$50,000	☐
Fidelity Balanced [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	☐
Fidelity Freedom Index 2040 Fund - Institutional Premium Class (FFIZX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
DESCRIPTION: 12/4/25 purchase from proceeds of sales of other reportable assets.					
Fidelity Government Cash Reserves [MF]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	☐
Hawaii State Federal Credit Union [BA]		\$1,001 - \$15,000	Dividends	None	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Johnson & Johnson (JNJ) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	☐
Marin Software Incorporated (MRIN) [ST]		None	Dividends	\$1 - \$200	☐
Microsoft Corporation (MSFT) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☐
Procter & Gamble Company (PG) [ST]		None	Dividends	\$1 - \$200	☒
DESCRIPTION: 12/22/25 full sale.					
UAL Stock Fund [MF]		None	None		☐
US Equity Index [MF]		\$250,001 - \$500,000	None		☐
DESCRIPTION: 12/1/25 partial sale; proceeds to purchase other reportable assets.					
USPBGC-United Airlines Flight Attendant EES [DB]		Undetermined	Pension	\$15,001 - \$50,000	☐
Vanguard Equity Income Fund Admiral Shares (VEIRX) [MF]		\$50,001 - \$100,000	Dividends	None	☒
DESCRIPTION: 12/23/25 \$100,000 purchase; proceeds from Alliant Credit Union					
Vanguard Federal Money Market [OT]		\$1 - \$1,000	Dividends	\$1 - \$200	☐
DESCRIPTION: No transaction over \$1,000.					
Vanguard FTSE Developed Mkts [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☒
DESCRIPTION: 12/23/25 \$100,000 purchase from Alliant Credit Union funds.					
Vanguard Health Care Admiral CL [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	☐
Vanguard High Dividend Yield [EF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	☐
Vanguard Intl Divid Apprec [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	☒
DESCRIPTION: 12/23/25 \$100,000 purchase from Allianz Credit Union funds.					
Vanguard Long Term Treasury [EF]		\$100,001 -	Dividends	\$5,001 -	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$250,000		\$15,000	☐
Vanguard Target 2015 [MF]		\$100,001 - \$250,000	None		☒
DESCRIPTION: 12/1/25 partial sale; proceeds invested in other reportable assets.					
Vanguard Target 2020 [MF]		\$250,001 - \$500,000	None		☒
DESCRIPTION: 12/1/25 partial sale; proceeds invested in other reportable assets					
Vanguard Total Bond Market [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐

* 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?
Procter & Gamble Company (PG) [ST]	SP	12/01/2025	S	\$1,001 - \$15,000	☒
Vanguard High Dividend Yield ETF (VYM) [EF]		03/25/2025	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment.					
Vanguard Health Care Fund Admiral Shares (VGHAX) [MF]		03/28/2025	S (partial)	\$1,001 - \$15,000	☒
DESCRIPTION: Longterm capital gain distribution.					
Vanguard Health Care Fund Admiral Shares (VGHAX) [MF]		03/28/2025	P	\$1,001 - \$15,000	
DESCRIPTION: Longterm capital gain reinvestment.					
Vanguard High Dividend Yield ETF (VYM) [EF]		06/24/2025	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment.					
Vanguard High Dividend Yield ETF (VYM) [EF]		09/23/2025	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment.					
Vanguard Health Care Fund Admiral Shares (VGHAX) [MF]		12/19/2025	S (partial)	\$1,001 - \$15,000	☒
DESCRIPTION: Longterm capital gain distribution.					
Vanguard Health Care Fund Admiral Shares (VGHAX) [MF]		12/19/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Longterm capital gain reinvestment.					
Vanguard Health Care Fund Admiral Shares (VGHAX) [MF]		12/19/2025	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment.					
Vanguard FTSE Developed Markets ETF (VEA) [EF]		12/23/2025	P	\$50,001 - \$100,000	
Vanguard International Dividend Appreciation ETF (VIGI) [EF]		12/23/2025	P	\$50,001 - \$100,000	
Vanguard Equity Income Fund Admiral Shares (VEIRX) [MF]		12/23/2025	P	\$50,001 - \$100,000	
Vanguard High Dividend Yield ETF (VYM) [EF]		12/23/2025	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment.					
Apple Inc. - Common Stock (AAPL) [ST]	SP	02/13/2025	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment					
Apple Inc. - Common Stock (AAPL) [ST]	SP	05/15/2025	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment.					
Apple Inc. - Common Stock (AAPL) [ST]	SP	08/14/2025	P	\$1,001 - \$15,000	
DESCRIPTION: Dividend reinvestment.					
Fidelity Balanced Fund (FBALX) [MF]	SP	10/10/2025	S (partial)	\$1,001 - \$15,000	☒
DESCRIPTION: Longterm capital gain distribution.					
Fidelity Balanced Fund (FBALX) [MF]	SP	10/10/2025	P	\$1,001 - \$15,000	
DESCRIPTION: Longterm capital gain reinvestment.					
Vanguard Target Retirement Income Trust [OT]		12/01/2025	S (partial)	\$1,001 - \$15,000	☒
LOCATION: US					
DESCRIPTION: Required minimum distribution.					
Vanguard Target Retirement 2020 Trust [OT]	SP	12/01/2025	S (partial)	\$15,001 - \$50,000	☒
LOCATION: US					
DESCRIPTION: Required minimum distribution.					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
U.S. Equity Index Fund [OT] LOCATION: US DESCRIPTION: Required minimum distribution.	SP	12/01/2025	S (partial)	\$15,001 - \$50,000	☒
Fidelity Balanced Fund (FBALX) [MF] DESCRIPTION: Dividend reinvestment.	SP	12/19/2025	P	\$1,001 - \$15,000	
Fidelity Freedom Index 2040 Fund - Institutional Premium Class (FFIZX) [MF] DESCRIPTION: Proceeds from sale of other reported transactions.	SP	12/24/2025	P	\$15,001 - \$50,000	
Fidelity Freedom Index 2040 Fund - Institutional Premium Class (FFIZX) [MF] DESCRIPTION: Dividend reinvestment	SP	12/30/2025	P	\$1,001 - \$15,000	
Apple Inc. - Common Stock (AAPL) [ST] DESCRIPTION: Dividend reinvestment.	SP	11/13/2025	P	\$1,001 - \$15,000	

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SCHEDULE C: EARNED INCOME

Source	Type	Amount
Vanguard Target Retirement Income Trust	Required minimum distribution from spouse's 401(k)	\$14,826.00
Vanguard Target Retirement 2020 Trust	Required minimum distribution from spouse's 401(k).	\$26,857.00
US Equity Index Fund	Required minimum distribution from spouse's 401(k)	\$40,773.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
August 1981	Employees Retirement System of the State of Hawaii and Ed Case	Defined benefit pension to be paid on final eligibility.

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?
Ripon Society and Franklin Center for Global Policy Exchange	08/04/2025	08/09/2026	Honolulu, USA - Geneva, Switzerland - Livingstone, Zambia	0	☒	☒	☒
Aspen Institute, Inc., Gates Foundation, Cooperative for Ass	08/09/2025	08/18/2025	Geneva, Switzerland - Livingstone, Zambia - Honolulu, USA	2	☒	☒	☒
United Nations Foundation and Eleanor Crook Foundation	08/22/2025	08/29/2025	Honolulu, USA - Ulaanbaatar, Mongolia - Honolulu, USA	0	☒	☒	☒

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

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. Ed Case , 04/10/2026