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Financial Disclosure Report

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

Filer Information

Name: Hon. John B. Larson
Status: Member
State/District: CT01

Filing Information

Filing Type: Annual Report
Filing Year: 2025
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Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
American Eagle Financial Credit Union Accounts [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	☐
Bank of America [BA]	JT	$1,001 - $15,000	None		☐
Bank of America [BA]		$15,001 - $50,000	Interest	$1 - $200	☐
Congressional Federal Credit Union accounts [BA]		$100,001 - $250,000	Interest	$2,501 - $5,000	☐
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Avantis U.S. Small Cap Value ETF (AVUV) [EF]		$15,001 - $50,000	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Avantis U.S. Small Cap Value ETF (AVUV) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Charles Schwab Bank [BA]		$1,001 - $15,000	Tax-Deferred		☐
CHARLES SCHWAB & CO INC; USADVISORS WEALTH	SP	$1,001 - $15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
MGMT ⇒ Charles Schwab Bank [BA]					
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Fidelity Enhanced International ETF (FENI) [EF]		$15,001 - $50,000	Tax-Deferred		✓
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Fidelity Enhanced International ETF (FENI) [EF]	SP	$1,001 - $15,000	Tax-Deferred		✓
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Fidelity Total Bond ETF (FBND) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☐
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Fidelity Total Bond ETF (FBND) [EF]		$15,001 - $50,000	Tax-Deferred		✓
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Invesco S&P SmallCap Momentum ETF (XSMO) [EF]		$15,001 - $50,000	Tax-Deferred		☐
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Invesco S&P SmallCap Momentum ETF (XSMO) [EF]	SP	$1,001 - $15,000	Tax-Deferred		✓
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Invesco Total Return Bond ETF (GTO) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☐
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Invesco Total Return Bond ETF (GTO) [EF]		$15,001 - $50,000	Tax-Deferred		✓
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		None	Tax-Deferred		✓
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	SP	None	Tax-Deferred		✓
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]		$15,001 - $50,000	Tax-Deferred		✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ JPMorgan Hedged Equity Laddered Overlay ETF (HELO) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☐
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ JPMorgan Hedged Equity Laddered Overlay ETF (HELO) [EF]		$15,001 - $50,000	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]		None	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]	SP	None	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ PIMCO Active Bond Exchange-Traded Fund Exchange-Traded Fund (BOND) [EF]		$15,001 - $50,000	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ PIMCO Active Bond Exchange-Traded Fund Exchange-Traded Fund (BOND) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]		$100,001 - $250,000	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [EF]		$100,001 - $250,000	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [EF]	SP	$15,001 - $50,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ State Street DoubleLine Total Return Tactical ETF (TOTL) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☐
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ WisdomTree U.S. Value Fund (WTV) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ WisdomTree U.S. Value Fund (WTV) [EF]		$15,001 - $50,000	Tax-Deferred		☑
Fidelity Investments SEP IRA ⇒ Fidelity Treasury Money Market [IH]		$1 - $1,000	Tax-Deferred		☐
Nationwide Fixed Index Annuity ⇒ Fixed Account [FN]		$500,001 - $1,000,000	Tax-Deferred		☐
Nationwide Fixed Index Annuity ⇒ S & P 500 Index [FN]		$500,001 - $1,000,000	Tax-Deferred		☐
State of Connecticut Deferred Compensation 457 Plan ⇒ Calvert Bond Fund Class I (CBDIX) [MF]	SP	None	Tax-Deferred		☐
State of Connecticut Deferred Compensation 457 Plan ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]	SP	None	Tax-Deferred		☐
State of Connecticut Deferred Compensation 457 Plan ⇒ Vanguard Total Bond Market Insti Plus Shares (VBMPX) [MF]	SP	None	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?
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ PIMCO Active Bond Exchange-Traded Fund Exchange-Traded Fund (BOND) [IR]		03/11/2025	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [IR] DESCRIPTION: Tax deferred		03/11/2025	S	$15,001 - $50,000	☐
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Avantis U.S. Small Cap Value ETF (AVUV) [IR]		03/11/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ iShares Russell Midcap Growth ETF (IWP) [IR]		03/11/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ WisdomTree U.S. Value Fund (WTV) [IR]		06/10/2025	P	$15,001 - $50,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [IR] DESCRIPTION: Tax deferred		06/10/2025	S (partial)	$1,001 - $15,000	☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ iShares Russell Midcap Growth ETF (IWP) [IR] DESCRIPTION: Tax deferred		06/10/2025	S (partial)	$1,001 - $15,000	☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Pacer US Cash Cows 100 ETF (COWZ) [IR] DESCRIPTION: Tax deferred		06/10/2025	S	$15,001 - $50,000	☐
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Fidelity Total Bond ETF (FBND) [IR]		06/11/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [IR]		06/10/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ PIMCO Active Bond Exchange-Traded Fund Exchange-Traded Fund (BOND) [IR]		06/10/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH		06/10/2025	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
MGMT ⇒ Invesco Total Return Bond ETF (GTO) [IR]					
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ JPMorgan Hedged Equity Laddered Overlay ETF (HELO) [IR] DESCRIPTION: Tax deferred	SP	12/03/2025	S (partial)	$15,001 - $50,000	✓
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Fidelity Enhanced International ETF (FENI) [IR]		12/03/2025	P	$15,001 - $50,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [IR]	SP	01/06/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [IR]	SP	01/06/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ PIMCO Active Bond Exchange-Traded Fund Exchange-Traded Fund (BOND) [IR]	SP	03/11/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Avantis U.S. Small Cap Value ETF (AVUV) [IR]	SP	03/11/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ iShares Russell Midcap Growth ETF (IWP) [IR]	SP	03/11/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [IR] DESCRIPTION: Tax deferred	SP	03/11/2025	S	$15,001 - $50,000	✓
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Invesco S&P SmallCap Momentum ETF (XSMO) [IR]	SP	03/11/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [IR]	SP	03/11/2025	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ WisdomTree U.S. Value Fund (WTV) [IR]	SP	06/10/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Pacer US Cash Cows 100 ETF (COWZ) [IR] DESCRIPTION: Tax deferred	SP	06/10/2025	S	$1,001 - $15,000	☐
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [IR] DESCRIPTION: Tax deferred	SP	06/10/2025	S (partial)	$1,001 - $15,000	☐
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ PIMCO Active Bond Exchange-Traded Fund Exchange-Traded Fund (BOND) [IR]	SP	06/10/2025	P	$1,001 - $15,000	
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ JPMorgan Hedged Equity Laddered Overlay ETF (HELO) [IR] DESCRIPTION: Tax deferred		12/03/2025	S (partial)	$1,001 - $15,000	☑
CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT ⇒ Fidelity Enhanced International ETF (FENI) [IR]	SP	12/03/2025	P	$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

Source	Type	Amount
Nationwide Life and Annuity Ins Co	Pension income that was rolled into an IRA	$62,384.00
Office of the State Comptroller	Pension income - Previous employment	$7,247.00
Office of the State Comptroller	Spouse Pension Income - Previous employment	$16,163.00

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

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 Investment Vehicle Details

- Fidelity Investments SEP IRA
- State of Connecticut Deferred Compensation 457 Plan (Owner: SP)
- Nationwide Fixed Index Annuity
- CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT (Owner: SP)
  Description: Rollover IRA of Leslie Larson - Charles Schwab IRA Rollover; managed by USAdvisors Wealth Management LLC
- CHARLES SCHWAB & CO INC; USADVISORS WEALTH MGMT
  Description: Rollover IRA of John Larson - Charles Schwab IRA Rollover; managed by USAdvisors Wealth Management LLC

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. John B. Larson , 05/14/2026