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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. Jimmy Panetta
Status: Member
State/District: CA19

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/13/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alameda County Employees' Retirement Association Pension [PE]		Undetermined	None		☐
Alameda County Employees' Retirement Association Pension [PE]	SP	Undetermined	None		☐
Bank of America [BA]	JT	\$50,001 - \$100,000	None		☐
CalPERS pension [PE]	SP	Undetermined	None		☐
CalPERS pension [PE]		Undetermined	None		☐
Citigroup Global Markets, Inc. 529 Plan ⇒ Capital Income Builder Class 529-A Shares (CIRAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☒
Citigroup Global Markets, Inc. 529 Plan ⇒ Capital World Growth and Income Fund Class 529-A Shares (CWIAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☒
Citigroup Global Markets, Inc. 529 Plan ⇒ EuroPacific Growth Fund, Class 529-A Shares (CEUAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Citigroup Global Markets, Inc. 529 Plan ⇒ Fundamental Investors, Class 529-A Shares (CFNAX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		☐
Citigroup Global Markets, Inc. 529 Plan ⇒ New World Fund, Inc., Class 529-A Shares (CNWAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☒
Citigroup Global Markets, Inc. 529 Plan ⇒ SMALLCAP World Fund, Inc., Class 529-A Shares (CSPAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☒
Citigroup Global Markets, Inc. 529 Plan ⇒ The Bond Fund of America, Class 529-A Shares (CFAAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☐
Citigroup Global Markets, Inc. 529 Plan ⇒ The Growth Fund of America Class 529-A Shares (CGFAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☒
Citigroup Global Markets, Inc. 529 Plan ⇒ The Income Fund of America, Class 529-A Shares (CIMAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☐
Citigroup Global Markets, Inc. 529 Plan ⇒ The Investment Company of America, Class 529-A Shares (CICAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☒
Janus IRA ⇒ Janus Henderson Global Life Sciences Fund - D Shares (JNGLX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Janus IRA ⇒ Janus Henderson Global Select Fund - D Shares (JANRX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Janus IRA ⇒ Janus Henderson Research Fund - D Shares (JNRFX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		☐
Morgan Stanley 529, DC1, account 1 ⇒ Capital Income Builder Class 529-A Shares (CIRAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley 529, DC1, account 1 ⇒ Capital World Growth and Income Fund Class 529-A Shares (CWIAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☒
Morgan Stanley 529, DC1, account 1 ⇒ EuroPacific Growth Fund, Class 529-A Shares (CEUAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley 529, DC1, account 1 ⇒ Fundamental Investors, Class 529-A Shares (CFNAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☒
Morgan Stanley 529, DC1, account 1 ⇒ SMALLCAP World Fund, Inc., Class 529-A Shares (CSPAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☒
Morgan Stanley 529, DC1, account 1 ⇒ The Bond Fund of America, Class 529-A Shares (CFAAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley 529, DC1, account 1 ⇒ The Growth Fund of America Class 529-A Shares (CGFAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☒
Morgan Stanley 529, DC1, account 1 ⇒ The Income Fund of America, Class 529-A Shares (CIMAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley 529, DC1, account 1 ⇒ The Investment Company of America, Class 529-A Shares (CICAX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Stanley 529, DC1, account 2 ⇒ American Balanced Fund, Class 529-C Shares (CLBCX) [MF]	DC	\$1,001 - \$15,000	Tax-Deferred		☒
Morgan Stanley 529, DC2, account 1 ⇒ American Balanced Fund, Class 529-C Shares (CLBCX) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		☒
Morgan Stanley 529, DC2, account 1 ⇒ American Funds Growth Portfolio Class 529-C (CGPCX) [MF]	DC	\$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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Citigroup Global Markets, Inc. 529 Plan ⇒ Capital Income Builder Class 529-A Shares (CIRAX) [MF]	DC	08/18/2025	S (partial)	\$1,001 - \$15,000	☐
Citigroup Global Markets, Inc. 529 Plan ⇒ Capital World Growth and Income Fund Class 529-A Shares (CWIAX) [MF]	DC	08/18/2025	S (partial)	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Citigroup Global Markets, Inc. 529 Plan ⇒ New World Fund, Inc., Class 529-A Shares (CNWAX) [MF]	DC	08/18/2025	S (partial)	\$1,001 - \$15,000	☐
Citigroup Global Markets, Inc. 529 Plan ⇒ SMALLCAP World Fund, Inc., Class 529-A Shares (CSPAX) [MF]	DC	08/18/2025	S (partial)	\$1,001 - \$15,000	☐
Citigroup Global Markets, Inc. 529 Plan ⇒ The Growth Fund of America Class 529-A Shares (CGFAX) [MF]	DC	08/18/2025	S (partial)	\$1,001 - \$15,000	☐
Citigroup Global Markets, Inc. 529 Plan ⇒ The Investment Company of America, Class 529-A Shares (CICAX) [MF]	DC	08/18/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley 529, DC2, account 1 ⇒ American Balanced Fund, Class 529-C Shares (CLBCX) [MF]	DC	12/16/2025	P	\$1,001 - \$15,000	
Morgan Stanley 529, DC1, account 1 ⇒ The Growth Fund of America Class 529-A Shares (CGFAX) [MF]	DC	12/18/2025	P	\$1,001 - \$15,000	
Morgan Stanley 529, DC1, account 2 ⇒ American Balanced Fund, Class 529-C Shares (CLBCX) [MF]	DC	01/08/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley 529, DC1, account 2 ⇒ American Balanced Fund, Class 529-C Shares (CLBCX) [MF]	DC	02/25/2025	P	\$1,001 - \$15,000	
Morgan Stanley 529, DC2, account 1 ⇒ American Balanced Fund, Class 529-C Shares (CLBCX) [MF]	DC	10/30/2025	P	\$1,001 - \$15,000	
Morgan Stanley 529, DC2, account 1 ⇒ American Balanced Fund, Class 529-C Shares (CLBCX) [MF]	DC	02/25/2025	P	\$1,001 - \$15,000	
Morgan Stanley 529, DC2, account 1 ⇒ American Funds Growth Portfolio Class 529-C (CGPCX) [MF]	DC	01/08/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley 529, DC1, account 1 ⇒ SMALLCAP World Fund, Inc., Class 529-A Shares (CSPAX) [MF]	DC	01/08/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley 529, DC1, account 1 ⇒ The Growth Fund of America Class 529-A Shares (CGFAX) [MF]	DC	08/13/2025	S (partial)	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley 529, DC1, account 1 ⇒ Fundamental Investors, Class 529-A Shares (CFNAX) [MF]	DC	08/13/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley 529, DC1, account 1 ⇒ Capital World Growth and Income Fund Class 529-A Shares (CWIAX) [MF]	DC	08/13/2025	S (partial)	\$1,001 - \$15,000	☐
Morgan Stanley 529, DC1, account 1 ⇒ New World Fund, Inc., Class 529-A Shares (CNWAX) [MF]	DC	08/13/2025	S	\$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
Monterey County Superior Court	spouse salary	N/A
State of California	spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo	June 2021	Mortgage on personal residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Honorary Board Member COMMENTS: Uncompensated	James Martin Center for Nonproliferation Studies
Advisory Council Member COMMENTS: Uncompensated	Carmel River Watershed Conservancy
Board Member COMMENTS: Uncompensated	Veterans Transition Center Advisory Council

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 1997	Myself and County of Alameda, CA	Participation in pension
March 2010	Myself and County of Monterey, CA	Participation in pension

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?
Atlantic Council of the United States, Inc.	06/13/2025	06/19/2025	San Francisco, CA - Riyadh, Saudi Arabia - Manama, Bahrain - Abu Dhabi, UAE - San Francisco, CA	0	☒	☒	☒
Reaction Digital Media Ltd.	05/08/2025	05/10/2025	Washington, DC - London, UK - Newark, NJ	0	☒	☒	☐
Ripon Society & Franklin Center for Global Policy Exchange	08/04/2025	08/09/2025	San Francisco, CA - Geneva, Switzerland - San Francisco, CA	0	☒	☒	☒
American Enterprise Institute	03/13/2025	03/16/2025	Washington, DC - Sea Island, GA - San Francisco, CA	0	☒	☒	☐
Yalta European Strategy Limited	09/11/2025	09/14/2025	Washington, DC - Kyiv, Ukraine - Washington, DC	0	☒	☒	☐
Indian Embassy to the US (MECEA)	09/19/2025	09/25/2025	Washington, DC - New Delhi, India - Agra, India - Mumbai, India - San Francisco, CA	0	☒	☒	☐
US Asia Institute (MECEA)	02/14/2025	02/22/2025	Washington, DC - Siem Reap, Cambodia - Phnom Penh, Cambodia - Angkor Wat, Cambodia - San Francisco, CA	0	☒	☒	☐

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Morgan Stanley 529, DC2, account 1 (Owner: DC)
LOCATION: CA
- Janus IRA (Owner: SP)
- Morgan Stanley 529, DC1, account 1 (Owner: DC)
LOCATION: CA
- Morgan Stanley 529, DC1, account 2 (Owner: DC)
LOCATION: CA
- Citigroup Global Markets, Inc. 529 Plan (Owner: DC)
LOCATION: CA

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. Jimmy Panetta , 08/13/2026