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Financial Disclosure Report

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Filer Information

Name: Hon. Diana DeGette
Status: Member
State/District: CO01

Filing Information

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/05/2026

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Colorado PERA [DB]	SP	$100,001 - $250,000	None		☐
Schwab Money Market Fund [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	☐
Wells Fargo Bank West, N.A. [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	☐
DeGette IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
DeGette IRA ⇒ Dimensional International Core Equity Market ETF (DFAI) [EF]		$1,001 - $15,000	Tax-Deferred		☐
DeGette IRA ⇒ Dimensional US Core Equity Market ETF (DFAU) [EF]		$15,001 - $50,000	Tax-Deferred		☐
DeGette IRA ⇒ Emerging Markets Core Equity 2 Portfolio (DFCEX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
DeGette IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		$15,001 - $50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
DeGette IRA ⇒ iShares MSCI EAFE Small-Cap ETF (SCZ) [EF]		$1,001 - $15,000	Tax-Deferred		☐
DeGette IRA ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]		$15,001 - $50,000	Tax-Deferred		☑
DeGette IRA ⇒ Schwab Money Market Fund [BA]		$1,001 - $15,000	Tax-Deferred		☐
DeGette IRA ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]		$1,001 - $15,000	Tax-Deferred		☐
Spouse IRA ⇒ Baird Aggregate Bond Fund Institutional Class (BAGIX) [MF]	SP	$250,001 - $500,000	Tax-Deferred		☑
Spouse IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Spouse IRA ⇒ DFA International Small Company Portfolio (DFISX) [MF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Spouse IRA ⇒ DFA Two-Year Global Fixed Income Portfolio (DFGFX) [MF]	SP	$100,001 - $250,000	Tax-Deferred		☐
Spouse IRA ⇒ Emerging Markets Core Equity 2 Portfolio (DFCEX) [MF]	SP	$100,001 - $250,000	Tax-Deferred		☐
Spouse IRA ⇒ International Core Equity 2 Portfolio (DFIEX) [MF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Spouse IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	$250,001 - $500,000	Tax-Deferred		☑
Spouse IRA ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Spouse IRA ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]	SP	$250,001 - $500,000	Tax-Deferred		☑
Spouse IRA ⇒ Schwab Money Market Fund [BA]	SP	$100,001 - $250,000	Tax-Deferred		☐
Spouse IRA ⇒	SP	$100,001 -	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Vanguard Inflation Protected Securities Fund Admiral Shares (VAIPX) [MF]		$250,000			
Spouse IRA ⇒ Vanguard Short-Term Investment Grade Fund Admiral Shrs (VFSUX) [MF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Spouse IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Spouse IRA ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	$100,001 - $250,000	Tax-Deferred		☐
Spouse IRA ⇒ Vanguard Value ETF (VTV) [EF]	SP	$50,001 - $100,000	Tax-Deferred		☑
TIAA-CREF Intelligent Life VUL ⇒ DFA Global Bond Portfolio [WU]	SP	$50,001 - $100,000	Tax-Deferred		☑
TIAA-CREF Intelligent Life VUL ⇒ DFA International Value Portfolio [WU]	SP	$15,001 - $50,000	Tax-Deferred		☑
TIAA-CREF Intelligent Life VUL ⇒ DFA Short-Term Fixed Income [WU]	SP	$15,001 - $50,000	Tax-Deferred		☐
TIAA-CREF Intelligent Life VUL ⇒ DFA U.S. Large Cap Value Portfolio [WU]	SP	$15,001 - $50,000	Tax-Deferred		☐
TIAA-CREF Intelligent Life VUL ⇒ DFA U.S. Targeted Value Portfolio [WU]	SP	$15,001 - $50,000	Tax-Deferred		☑
TIAA-CREF Intelligent Life VUL ⇒ DFA VA International Small Portfolio [WU]	SP	$15,001 - $50,000	Tax-Deferred		☐
TIAA-CREF Intelligent Life VUL ⇒ Nuveen Life International Equity Fund [WU]	SP	$15,001 - $50,000	Tax-Deferred		☐
TIAA-CREF Intelligent Life VUL ⇒ Nuveen Life Stock Index Fund [WU]	SP	$50,001 - $100,000	Tax-Deferred		☐
TIAA-CREF Intelligent Life VUL ⇒ Templeton Developing Markets Trust Class A [WU]	SP	$15,001 - $50,000	Tax-Deferred		☑
TIAA-CREF Intelligent Life VUL ⇒	SP	$15,001 - $50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
TIAA-CREF Fixed Rate Account [WU]					

* 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?
TIAA-CREF Intelligent Life VUL ⇒ DFA U.S. Targeted Value Portfolio [WU]	SP	11/14/2025	P	$1,001 - $15,000	
Spouse IRA ⇒ Baird Aggregate Bond Fund Institutional Class (BAGIX) [MF]	SP	05/14/2025	P	$250,001 - $500,000	
Spouse IRA ⇒ Vanguard Short-Term Investment Grade Fund Admiral Shrs (VFSUX) [MF]	SP	05/13/2025	S (partial)	$250,001 - $500,000	☐
Spouse IRA ⇒ DFA International Small Company Portfolio (DFISX) [MF]	SP	05/13/2025	S (partial)	$1,001 - $15,000	☐
Spouse IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]	SP	05/13/2025	S (partial)	$1,001 - $15,000	☐
TIAA-CREF Intelligent Life VUL ⇒ DFA Global Bond Portfolio [WU]	SP	11/14/2025	P	$1,001 - $15,000	
TIAA-CREF Intelligent Life VUL ⇒ DFA International Value Portfolio [WU]	SP	11/14/2025	S (partial)	$1,001 - $15,000	☐
TIAA-CREF Intelligent Life VUL ⇒ Templeton Developing Markets Trust Class A [WU]	SP	11/14/2025	S (partial)	$1,001 - $15,000	☐
Spouse IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	05/13/2025	S (partial)	$50,001 - $100,000	☐
Spouse IRA ⇒ Vanguard Value ETF (VTV) [EF]	SP	05/13/2025	S (partial)	$1,001 - $15,000	☐
Spouse IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	05/13/2025	S (partial)	$15,001 - $50,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Spouse IRA ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]	SP	05/14/2025	P	$50,001 - $100,000	
Spouse IRA ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]	SP	05/14/2025	P	$250,001 - $500,000	
Spouse IRA ⇒ International Core Equity 2 Portfolio (DFIEX) [MF]	SP	05/13/2025	S (partial)	$15,001 - $50,000	☐
Spouse IRA ⇒ Vanguard Inflation Protected Securities Fund Admiral Shares (VAIPX) [MF]	SP	05/14/2025	P	$1,001 - $15,000	
Spouse IRA ⇒ DFA Investment Grade Portfolio (DFAPX) [MF]	SP	05/13/2025	S	$250,001 - $500,000	☐
DeGette IRA ⇒ Vanguard Short-Term Bond ETF (BSV) [EF]		05/13/2025	S	$15,001 - $50,000	☐
DeGette IRA ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]		05/14/2025	P	$15,001 - $50,000	

* 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
State of Colorado	Spouse salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo Home Mortgage	January 2015	Mortgage on D.C. townhouse	$250,001 - $500,000
	Wells Fargo Home Mortgage	May 2017	Mortgage on Denver home	$250,001 - $500,000
	Wells Fargo Home Mortgage	June 2023	Mortgage on Park Hill house	$250,001 - $500,000

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?**
U.S. Association for Former Members of Congress	04/11/2025	04/19/2025	Washington, DC - Tokyo - Denver	2	☑	☑	☐
The Aspen Institute – Congressional Program	05/26/2025	05/31/2025	New York, NY - Malaga, Spain - Seville, Spain - Denver	0	☑	☑	☑

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

- DeGette IRA
  Description: Diana DeGette's IRA
- Spouse IRA (Owner: SP)
  Description: Lino Lipinsky's IRA
- TIAA-CREF Intelligent Life VUL (Owner: SP)

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. Diana DeGette , 08/05/2026