



Filing ID #10077120

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Jim Costa
Status: Member
State/District: CA21

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?
Bank of America [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	☐
James M. Costa Farms (Sole Proprietorship) [FA] LOCATION: Fresno, CA, US DESCRIPTION: Farming operation		\$1,000,001 - \$5,000,000	Farm Income	\$100,001 - \$1,000,000	☐
Portuguese Fraternal Society of America [WU]		\$1,001 - \$15,000	None		☐
Rental Home [RP] LOCATION: Washington, DC, US		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	☐
UMB Financial Corporation - Common Stock (UMBF) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
United Security Bank [BA]		\$1,001 - \$15,000	None		☐
Wells Fargo Advisors 401(k) ⇒ Allspring Special Mid Cap Value Fund Insti Class (WFMIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo Advisors 401(k) ⇒ American Funds Washington Mutual Investors Fund Class F-2 [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ Baird Aggregate Bond Fund Class Institutional [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Wells Fargo Advisors 401(k) ⇒ Baron Inv't Funds Trust Small Cap Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ Baron Select Funds Emerging Markets FD [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ Causeway International Value Fund - Institutional Class (CIVIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Wells Fargo Advisors 401(k) ⇒ Dodge & Cox Stk FD [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ Eaton Vance Income Fund of Boston Class I [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Wells Fargo Advisors 401(k) ⇒ Embark Commodity Strategy Fund Institutional Class (ECSWX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ EuroPacific Growth Fund, Class F-2 Shs (AEPFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ Goldman Sachs FS Treasury Instruments Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ Invesco Developing Markets Fund [MF]		None	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ JPMorgan U.S. Equity Fund Class L (JMUEX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ JPMorgan Emerging Markets Equity Fund Class L (JMIEX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ Lazard Emerging Markets Equity Portfolio Institutional		\$15,001 - \$50,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Shares (LZEMX) [MF]					
Wells Fargo Advisors 401(k) ⇒ MFS SER TR 1 VALUE FD [MF]		\$50,001 - \$100,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ NYLI Winslow Large Cap Growth Fund Class I (MLAIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ PIMCO Commodities Plus Strategy FD CL [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Wells Fargo Advisors 401(k) ⇒ ROWE T PRICE MID CAP GROWTH FUND [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ T Rowe Price Overseas Stock Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ Victory Sycamore Small Co Oppty [MF]		\$15,001 - \$50,000	Tax-Deferred		☒
Wells Fargo Advisors 401(k) ⇒ Virtus Ceredex Mid-Cap Value Equity Fund Class I [MF]		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?
Wells Fargo Advisors 401(k) ⇒ Baron Select Funds Emerging Markets FD [MF]		07/28/2025	S (partial)	\$1,001 - \$15,000	☐
Wells Fargo Advisors 401(k) ⇒ Baron Invst Funds Trust Small Cap Fund [MF]		07/28/2025	S (partial)	\$1,001 - \$15,000	☐
Wells Fargo Advisors 401(k) ⇒ American Funds Washington Mutual Investors Fund Class F-2 [MF]		06/12/2025	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Dodge & Cox Stk FD [MF]		12/22/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo Advisors 401(k) ⇒ Embark Commodity Strategy Fund Institutional Class (ECSWX) [MF]		12/22/2025	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ EuroPacific Growth Fund, Class F-2 Shs (AEPFX) [MF]		07/28/2025	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Goldman Sachs FS Treasury Instruments Fund [MF]		10/10/2025	S (partial)	\$1,001 - \$15,000	☐
Wells Fargo Advisors 401(k) ⇒ Invesco Developing Markets Fund [MF]		07/28/2025	S	\$15,001 - \$50,000	☐
Wells Fargo Advisors 401(k) ⇒ NYLI Winslow Large Cap Growth Fund Class I (MLAIX) [MF]		07/11/2025	S (partial)	\$1,001 - \$15,000	☐
Wells Fargo Advisors 401(k) ⇒ MFS SER TR 1 VALUE FD [MF]		12/12/2025	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ ROWE T PRICE MID CAP GROWTH FUND [MF]		12/12/2025	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ T Rowe Price Overseas Stock Fund [MF]		07/28/2025	S (partial)	\$1,001 - \$15,000	☐
Wells Fargo Advisors 401(k) ⇒ Victory Sycamore Small Co Oppty [MF]		07/28/2025	S (partial)	\$1,001 - \$15,000	☐
Wells Fargo Advisors 401(k) ⇒ Lazard Emerging Markets Equity Portfolio Institutional Shares (LZEMX) [MF]		07/28/2025	P	\$15,001 - \$50,000	
Wells Fargo Advisors 401(k) ⇒ JPMorgan U.S. Equity Fund Class L (JMUEX) [MF]		07/28/2025	P	\$15,001 - \$50,000	
Wells Fargo Advisors 401(k) ⇒ Allspring Special Mid Cap Value Fund Insti Class (WFMIX) [MF]		07/28/2025	P	\$15,001 - \$50,000	
Wells Fargo Advisors 401(k) ⇒ JPMorgan Emerging Markets Equity Fund Class L (JMIEX) [MF]		07/28/2025	P	\$15,001 - \$50,000	
Wells Fargo Advisors 401(k) ⇒		12/19/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
American Funds Washington Mutual Investors Fund Class F-2 [MF]					
Wells Fargo Advisors 401(k) ⇒ Goldman Sachs FS Treasury Instruments Fund [MF]		07/29/2025	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Goldman Sachs FS Treasury Instruments Fund [MF]		04/10/2025	S (partial)	\$1,001 - \$15,000	☐
Wells Fargo Advisors 401(k) ⇒ Goldman Sachs FS Treasury Instruments Fund [MF]		01/10/2025	S (partial)	\$1,001 - \$15,000	☐
Wells Fargo Advisors 401(k) ⇒ NYLI Winslow Large Cap Growth Fund Class I (MLAIX) [MF]		12/05/2025	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Allspring Special Mid Cap Value Fund Insti Class (WFMIX) [MF]		12/16/2025	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ T Rowe Price Overseas Stock Fund [MF]		12/15/2025	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Virtus Ceredex Mid-Cap Value Equity Fund Class I [MF]		07/28/2025	S	\$15,001 - \$50,000	☐

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SCHEDULE C: EARNED INCOME

Source	Type	Amount
California Public Employee Retirement System	Legislative Pension	\$4,610.00
California Legislator Retirement System	Legislative Pension	\$9,703.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Premier Valley Bank	March 2019	Line of Credit	\$100,001 - \$250,000
	PNC Bank	August 2021	Mortgage on personal residence	\$250,001 - \$500,000

The National Capital Bank	July 2006	Mortgage on Washington D.C. property	\$250,001 - \$500,000
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SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member COMMENTS: Not compensated	The Maddy Institute, CA State University, Fresno
Advisory Council Member COMMENTS: Not compensated	The Congressional Hispanic Caucus Institute

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2005	Myself & California Public Employees Retirement Systems	Pension Plan Participation
January 2003	Myself & California Legislator Retirement Systems	Pension Plan Participation

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?
Luso-American Development Foundation	06/28/2025	07/01/2025	Washington, DC - Lisbon, Portugal - Washington, DC	0	☒	☒	☐
The Aspen Institute, Inc.	04/21/2025	04/26/2025	Fresno, CA - Bellagio, Italy - Washington, DC	0	☒	☒	☐

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

◦ Wells Fargo Advisors 401(k)

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. Jim Costa , 08/13/2026