



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. James A. Himes
Status: Member
State/District: CT04

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 07/01/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Express Savings [BA]	JT	\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000	☐
Chase Savings Account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	☐
Chase Workplace Checking [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	☐
Empower Aggressive Profile Fund [IH]		\$100,001 - \$250,000	Tax-Deferred		☐
Principal Bank Safe Harbor IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Brokerage ⇒ Columbia Contrarian Core Fund [EF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	☐
Fidelity Brokerage ⇒ Fidelity 2022 Private Equity Multi Strategy [HE]	JT	\$250,001 - \$500,000	None		☒
Fidelity Brokerage ⇒ Fidelity Capital Appreciation [EF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Brokerage ⇒ Fidelity Government Money Market [MF]	JT	\$500,001 - \$1,000,000	Interest	\$5,001 - \$15,000	☒
Fidelity Brokerage ⇒ Fidelity International Discovery [EF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	☐
Fidelity Brokerage ⇒ Fidelity International Small Cap [EF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	☐
Fidelity Brokerage ⇒ Fidelity Intl Cap Appreciation [EF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	☐
Fidelity Brokerage ⇒ Fidelity Intl Real Estate Fund [EF] DESCRIPTION: Sold entire position on 9/16/25	JT	None	Dividends	\$1,001 - \$2,500	☒
Fidelity Brokerage ⇒ Fidelity Pacific Basin [EF]	JT	\$50,001 - \$100,000	Dividends, Interest	\$5,001 - \$15,000	☐
Fidelity Brokerage ⇒ Fidelity Total Mkt Index FID Advantage [EF]	JT	\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	☐
Fidelity Brokerage ⇒ GS Small Cap Value [EF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	☐
Fidelity Brokerage ⇒ iShares S&P 500 [EF]	JT	\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	☐
Fidelity Brokerage ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	☐
Fidelity Brokerage ⇒ Private Equity Multi-Strategy Fund III [HE]	JT	\$50,001 - \$100,000	None		☒
Fidelity Brokerage ⇒ Vanguard Information Technology ETF [EF] DESCRIPTION: Sold entire position on 11/3/25	JT	None	Capital Gains, Dividends	\$100,001 - \$1,000,000	☒
Fidelity Rollover IRA ⇒ Fidelity Blue Chip Value [EF]		\$100,001 - \$250,000	Tax-Deferred		☒
Fidelity Rollover IRA ⇒ Fidelity Capital & Income [EF] DESCRIPTION: Sold entire position 9/16/25		None	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Rollover IRA ⇒ Fidelity Growth Strategies Fund [EF] DESCRIPTION: Sold entire position 9/16/25		None	Tax-Deferred		☒
Fidelity Rollover IRA ⇒ Fidelity Intl Cap Appreciation [EF]		\$100,001 - \$250,000	Tax-Deferred		☒
Fidelity Rollover IRA ⇒ Fidelity Real Estate Income [EF] DESCRIPTION: Sold entire position 9/16/25		None	Tax-Deferred		☒
Fidelity Rollover IRA ⇒ Fidelity Total Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Rollover IRA ⇒ Fidelity Total Mkt Index FID Advantage [EF]		\$250,001 - \$500,000	Tax-Deferred		☒
Fidelity Rollover IRA ⇒ Fidelity Value Discovery [EF] DESCRIPTION: Sold entire position 10/9/25		None	Tax-Deferred		☒
Fidelity Rollover IRA ⇒ Hennessy Cornerstone Growth Inv [EF]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Self-Employed 401(k) ⇒ Columbia Select Large Cap Equity [EF]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Self-Employed 401(k) ⇒ Fidelity Blue Chip Value [EF] DESCRIPTION: Sold entire position 9/16/25		None	Tax-Deferred		☒
Fidelity Self-Employed 401(k) ⇒ Fidelity Cash Reserves [BA] DESCRIPTION: Proceeds from sales transferred		\$50,001 - \$100,000	Tax-Deferred		☒
Fidelity Self-Employed 401(k) ⇒ Fidelity Fund [EF] DESCRIPTION: Sold entire position 9/16/25		None	Tax-Deferred		☒
Spouse IRA ⇒ Fidelity Magellan [MF]	SP	\$100,001 - \$250,000	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?
Fidelity Brokerage ⇒ Vanguard Information Tech ETF (VGT) [EF]	JT	11/03/2025	S	\$250,001 - \$500,000	☒
Fidelity Brokerage ⇒ Private Equity Multi-Strategy Fund III [HE]	JT	12/01/2025	P	\$15,001 - \$50,000	
Fidelity Brokerage ⇒ Private Equity Multi-Strategy Fund III [HE]	JT	10/01/2025	P	\$1,001 - \$15,000	
Fidelity Brokerage ⇒ Fidelity 2022 Private Equity Multi Strategy [HE]	JT	10/15/2025	P	\$15,001 - \$50,000	
Fidelity Brokerage ⇒ Fidelity 2022 Private Equity Multi Strategy [HE]	JT	07/01/2025	P	\$15,001 - \$50,000	
Fidelity Brokerage ⇒ Fidelity 2022 Private Equity Multi Strategy [HE]	JT	04/09/2025	P	\$15,001 - \$50,000	
Fidelity Brokerage ⇒ Fidelity 2022 Private Equity Multi Strategy [HE]	JT	01/10/2025	P	\$15,001 - \$50,000	
Fidelity Brokerage ⇒ Fidelity International Real Estate Fund (FIREX) [MF]	JT	09/16/2025	S	\$15,001 - \$50,000	☐
Fidelity Rollover IRA ⇒ Fidelity Capital and Income Fund (FAGIX) [MF]		09/16/2025	S	\$100,001 - \$250,000	☒
Fidelity Rollover IRA ⇒ Fidelity Growth Strategies Fund (FDEGX) [MF]		09/16/2025	S	\$250,001 - \$500,000	☒
Fidelity Rollover IRA ⇒ Fidelity Real Estate Income (FRIFX) [MF]		09/16/2025	S	\$100,001 - \$250,000	☒
Fidelity Rollover IRA ⇒ Fidelity Value Discovery (FVDFX) [MF]		10/09/2025	S	\$250,001 - \$500,000	☒
Fidelity Self-Employed 401(k) ⇒ Fidelity Blue Chip Value (FBCVX) [MF]		09/16/2025	S	\$1,001 - \$15,000	☒
Fidelity Self-Employed 401(k) ⇒		09/16/2025	S	\$50,001 -	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Fund (FFIDX) [MF]				\$100,000	
Fidelity Rollover IRA ⇒ Fidelity Capital Appreciation Fund Class K (FCAKX) [MF] DESCRIPTION: Tax deferred, reinvestment		12/12/2025	P	\$1,001 - \$15,000	
Fidelity Rollover IRA ⇒ Fidelity Blue Chip Value (FBCVX) [MF] DESCRIPTION: Tax deferred, reinvestment		12/19/2025	P	\$1,001 - \$15,000	
Fidelity Rollover IRA ⇒ Fidelity Total Market Index Fund (FSKAX) [MF] DESCRIPTION: Tax deferred, reinvestment		12/19/2025	P	\$1,001 - \$15,000	
Fidelity Rollover IRA ⇒ Fidelity Blue Chip Value (FBCVX) [MF] DESCRIPTION: Tax deferred, reinvestment		09/12/2025	P	\$1,001 - \$15,000	
Fidelity Rollover IRA ⇒ Fidelity Value Discovery (FVDFX) [MF] DESCRIPTION: Tax deferred, reinvestment		09/12/2025	P	\$15,001 - \$50,000	
Fidelity Rollover IRA ⇒ Fidelity Real Estate Income (FRIFX) [MF] DESCRIPTION: Tax deferred, reinvestment		07/11/2025	P	\$1,001 - \$15,000	
Fidelity Rollover IRA ⇒ Fidelity International Capital Appreciation K6 Fund (FAPCX) [MF] DESCRIPTION: Tax deferred, reinvestment		07/22/2025	P	\$15,001 - \$50,000	
Fidelity Rollover IRA ⇒ Fidelity Real Estate Income (FRIFX) [MF] DESCRIPTION: Tax deferred, reinvestment		04/04/2025	P	\$1,001 - \$15,000	
Fidelity Self-Employed 401(k) ⇒ Fidelity Cash Reserves (FDRXX) [MF] DESCRIPTION: Investment in cash of sales proceeds		09/16/2025	P	\$50,001 - \$100,000	
Fidelity Brokerage ⇒ Fidelity Government Money Market Fund (SPAXX) [MF] DESCRIPTION: Sweep of dividends, capital gains and interest payments into this cash account.	JT	Monthly	P	\$50,001 - \$100,000	

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<https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	JP Morgan Chase	October 1998	Mortgage on CT Residence	\$100,001 - \$250,000
JT	JP Morgan Chase	April 2021	Mortgage on DC residence	\$500,001 - \$1,000,000
JT	American Express	December 2025	Credit Card	\$10,000 - \$15,000

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?
J Street	02/13/2025	02/21/2025	Washington, DC - Tel Aviv, Israel - New York, NY	0	☒	☒	☐
Marshall Scholars Foundation	05/08/2025	05/13/2025	Washington, DC - London, UK - Cambridge, UK - Washington, DC	0	☒	☒	☒
Aspen Institute	08/11/2025	08/18/2025	New York, NY - Livingstone, Zambia - New York, NY	0	☒	☒	☒
Climate Solutions Foundation	09/22/2025	09/23/2025	New York, NY - New York, NY - New York, NY	0	☒	☒	☐

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Spouse IRA (Owner: SP)
- Fidelity Self-Employed 401(k)
- Fidelity Rollover IRA
- Fidelity Brokerage (Owner: JT)
LOCATION: US

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. James A. Himes , 07/01/2026