



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Donald J. Bacon
Status: Member
State/District: NE02

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2025
Filing Date: 06/06/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Athene Life Insurance (Whole) [WU]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Athene Life Insurance (Whole) [WU]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
COBALT Federal Credit Union [BA]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Hay Field [FA]	JT	\$250,001 - \$500,000	Rent	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Papillion, NE, US DESCRIPTION: Neighbor bails the hay from our property. Tyler Krapp Farms pays for the hay.					
US Bank Savings Account [BA]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
US Bank Savings Account [BA]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity IRA Rollover ⇒ Blue Owl Technology Fin Corp Note 6.12500% 01/23/2031 Call Make Whole [CS]		\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Details are on Transactions Page					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity IRA Rollover ⇒ Carlyle Secured Lending Inc Note 6.75000% 02/18/2030 Call Make Whole [CS]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Details are on transactions page					
Fidelity IRA Rollover ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$50,001 - \$100,000	Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Stevens Capital Partners purchased 5/22/2026					
Fidelity IRA Rollover ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Just purchased, no income yet					
Fidelity IRA Rollover ⇒ Oaktree Specialty Lending Note 6.34000% 02/27/2030 Call Make Whole [CS]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Details are on transactions page					
Fidelity IRA Rollover ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Stevens Capital Partners purchased 5/22/2026					
Fidelity IRA Rollover ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Just purchased 5/12/26, no income yet					
Fidelity IRA Rollover ⇒ Schwab International Equity ETF (SCHF) [EF]		\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Just purchased 5/12/26, no income yet					
Fidelity IRA Rollover ⇒ Schwab International Equity ETF (SCHF) [EF]	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Stevens Capital Partners purchased 5/22/2026					
Fidelity IRA Rollover ⇒ Schwab International Small-Cap Equity ETF (SCHC) [EF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Stevens Capital Partners purchased 5/22/2026					
Fidelity IRA Rollover ⇒ Schwab International Small-Cap Equity ETF (SCHC) [EF]		\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
DESCRIPTION: Just purchased 5/12/26, no income yet					
Fidelity IRA Rollover ⇒ Schwab U.S. Mid Cap ETF (SCHM) [EF]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Stevens Capital Partners purchased 5/12/26 & 5/21/26					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity IRA Rollover ⇒ Schwab U.S. Mid Cap ETF (SCHM) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Fidelity IRA Rollover ⇒ State Street SPDR Portfolio S&P 500 Value ETF (SPYV) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Fidelity IRA Rollover ⇒ State Street SPDR Portfolio S&P 500 Value ETF (SPYV) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/12/26 & 5/21/26		\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Fidelity IRA Rollover ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Fidelity IRA Rollover ⇒ State Street SPDR S&P 600 Small Cap Value ETF (SLYV) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Fidelity IRA Rollover ⇒ State Street SPDR S&P 600 Small Cap Value ETF (SLYV) [EF] DESCRIPTION: Just purchased 5/12/26, no income yet		\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Fidelity IRA Rollover ⇒ Stepstone Private Markets Class I (XPMIX) [MF] DESCRIPTION: Stevens Capital Partners bought 5/22/2026		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Fidelity IRA Rollover ⇒ Trinity Cap Inc Note Call Make Whole 7.00000% 505/21/2031 [CS] DESCRIPTION: Details are on transactions page		\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Fidelity IRA Rollover ⇒ Vanguard Growth ETF (VUG) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/12/26 & 5/21/26		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Fidelity IRA Rollover ⇒ Vanguard Growth ETF (VUG) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity IRA Rollover ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Fidelity IRA Rollover ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/12/26 & 5/21/26		\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Franklin Mutual Shares fund - Class A ⇒ Franklin Mutual Shares Fund--Class A [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
LPL Financial ⇒ WLGAX Delaware Ivy Large Cap Growth Cl A [MF]		\$250,001 - \$500,000	Capital Gains	\$15,001 - \$50,000	<input type="checkbox"/>
Principle ⇒ Principle Investments (Prin Life Time 2030 Inst Fund) [PE] DESCRIPTION: Pension Plan with University of Bellevue		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Prudential PruLife UL Protector ⇒ Prudential Life Insurance (Universal) [WU]		\$250,001 - \$500,000	None		<input type="checkbox"/>
Victory Capital USAA 529 College Savings Plan ⇒ Victory Capital Fund with USAA [5P] LOCATION: NV DESCRIPTION: The fund is divided up between age-based option moderate portfolio, aggressive growth portfolio, growth portfolio and moderately aggressive portfolio.	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

* 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 IRA Rollover ⇒ iShares Core S&P 500 ETF (IVV) [EF] DESCRIPTION: IRA Account managed by Stevens Capital Partners		05/12/2026	P	\$15,001 - \$50,000	
Fidelity IRA Rollover ⇒ Schwab International Small-Cap Equity ETF (SCHC) [EF] DESCRIPTION: IRA Account managed by Stevens Capital Partners		05/12/2026	P	\$1,001 - \$15,000	
Fidelity IRA Rollover ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		05/12/2026	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: IRA Account managed by Stevens Capital Partners					
Fidelity IRA Rollover ⇒ Schwab International Equity ETF (SCHF) [EF]		05/12/2026	P	\$15,001 - \$50,000	
DESCRIPTION: IRA Account managed by Stevens Capital Partners					
Fidelity IRA Rollover ⇒ Schwab U.S. Mid Cap ETF (SCHM) [EF]		05/12/2026	P	\$1,001 - \$15,000	
DESCRIPTION: IRA Account managed by Stevens Capital Partners					
Fidelity IRA Rollover ⇒ State Street SPDR S&P 600 Small Cap Growth ETF (SLYG) [EF]		05/12/2026	P	\$1,001 - \$15,000	
DESCRIPTION: IRA Account managed by Stevens Capital Partners					
Fidelity IRA Rollover ⇒ State Street SPDR S&P 600 Small Cap Value ETF (SLYV) [EF]		05/12/2026	P	\$1,001 - \$15,000	
DESCRIPTION: IRA Account managed by Stevens Capital Partners					
Fidelity IRA Rollover ⇒ State Street SPDR Portfolio S&P 500 Value ETF (SPYV) [EF]		05/12/2026	P	\$1,001 - \$15,000	
DESCRIPTION: IRA Account managed by Stevens Capital Partners					
Fidelity IRA Rollover ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]		05/12/2026	P	\$1,001 - \$15,000	
DESCRIPTION: IRA Account managed by Stevens Capital Partners					
Fidelity IRA Rollover ⇒ Vanguard Growth ETF (VUG) [EF]		05/12/2026	P	\$15,001 - \$50,000	
DESCRIPTION: IRA Account managed by Stevens Capital Partners					
Fidelity IRA Rollover ⇒ Macquarie Large Cap Growth Fund A (WLGAX) [MF]	SP	05/20/2026	S	\$250,001 - \$500,000	<input type="checkbox"/>
Fidelity IRA Rollover ⇒ Stepstone Private Markets Class I (XPMIX) [MF]		05/21/2026	P	\$15,001 - \$50,000	
DESCRIPTION: Stevens Capital Partners purchased 5/22/2026					
Fidelity IRA Rollover ⇒ Vanguard Growth ETF (VUG) [EF]		05/21/2026	P	\$1,001 - \$15,000	
DESCRIPTION: Stevens Capital Partners purchased 5/22/2026					
Fidelity IRA Rollover ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]		05/21/2026	P	\$1,001 - \$15,000	
DESCRIPTION: Stevens Capital Partners purchased 5/22/2026					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity IRA Rollover ⇒ Schwab U.S. Mid Cap ETF (SCHM) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026		05/21/2026	P	\$1,001 - \$15,000	
Fidelity IRA Rollover ⇒ State Street SPDR Portfolio S&P 500 Value ETF (SPYV) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026		05/21/2026	P	\$1,001 - \$15,000	
Fidelity IRA Rollover ⇒ iShares Core S&P 500 ETF (IVV) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026		05/21/2026	P	\$1,001 - \$15,000	
Fidelity IRA Rollover ⇒ Vanguard Growth ETF (VUG) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026	SP	05/21/2026	P	\$15,001 - \$50,000	
Fidelity IRA Rollover ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026	SP	05/21/2026	P	\$1,001 - \$15,000	
Fidelity IRA Rollover ⇒ Schwab International Small-Cap Equity ETF (SCHC) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026	SP	05/21/2026	P	\$1,001 - \$15,000	
Fidelity IRA Rollover ⇒ Schwab International Equity ETF (SCHF) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026	SP	05/21/2026	P	\$15,001 - \$50,000	
Fidelity IRA Rollover ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF] DESCRIPTION: Stevens Capital Partners purchased 5/22/2026	SP	05/21/2026	P	\$1,001 - \$15,000	
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Fidelity IRA Rollover ⇒ Carlyle Secured Lending Inc Note 6.75000% 02/18/2030 Call Make Whole [CS] DESCRIPTION: Stevens Capital Partners purchased corporate bond	SP	06/03/2026	P	\$1,001 - \$15,000	
Fidelity IRA Rollover ⇒ Oaktree Specialty Lending Note 6.34000% 02/27/2030 Call Make Whole [CS] DESCRIPTION: Stevens Capital Partners purchased corporate bond	SP	06/03/2026	P	\$1,001 - \$15,000	
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SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Citizens Bank	July 2024	Mortgage on our home	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Chaplain COMMENTS: Uncompensated	Local Chapter of the Military Officers of America Association
Board of Visitors	Air Force Academy
Board Member	U.S. Holocaust Museum
Board Member	Congressional Office of International Leadership

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2014	Myself and University of Bellevue	This was a pension plan when I was with University of Bellevue. I no longer contribute to it, but the pension is saved.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
RMSP (Mainstreet Republicans)	04/05/2025	04/18/2025	Washington D.C. - Crete, Greede - Omaha, Nebraska	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Marshall Scholars	05/08/2025	05/13/2025	Washington D.C. - London, UK - Omaha, Nebraska	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
N7 Atlantic Council	06/13/2025	06/20/2025	Washington D.C. - Saudi Arabia - Bahrain - UAE - Omaha, Nebraska	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Principle
DESCRIPTION: Bellevue University Retirement Plan
- Victory Capital USAA 529 College Savings Plan (Owner: JT)
LOCATION: NV
DESCRIPTION: 529 Fund is for our granddaughter.
- Franklin Mutual Shares fund - Class A
DESCRIPTION: My IRA
- Prudential PruLife UL Protector
DESCRIPTION: Life insurance on myself
- LPL Financial
- Fidelity IRA Rollover
DESCRIPTION: IRA Rollover for Military & Civilian TSP
- Fidelity IRA Rollover (Owner: SP)
DESCRIPTION: Rollover from LPL

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. Donald J. Bacon , 06/06/2026