



Filing ID #10081578

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Ami Bera  
**Status:** Member  
**State/District:** CA06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2025  
**Filing Date:** 08/12/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset                                                                    | Owner | Value of Asset        | Income Type(s)              | Income            | Tx. > \$1,000?           |
|--------------------------------------------------------------------------|-------|-----------------------|-----------------------------|-------------------|--------------------------|
| ABERDEEN STNDRD PHYSCL [EF]<br><br>DESCRIPTION: Partial Sale on 11/9/23  | JT    | \$1,001 - \$15,000    | Capital Gains,<br>Dividends | \$201 - \$1,000   | <input type="checkbox"/> |
| American Century CA [MF]                                                 | JT    | \$250,001 - \$500,000 | Dividends                   | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Elk Grove Commerce Bank [BA]                                             | JT    | \$1,001 - \$15,000    | Interest                    | \$1 - \$200       | <input type="checkbox"/> |
| Energy Select Sector SPDR [MF]<br><br>DESCRIPTION: Purchase on 2/24/22   | JT    | \$15,001 - \$50,000   | Dividends                   | \$1,001 - \$2,500 | <input type="checkbox"/> |
| FIDELITY MSCI COMM SRV [EF]<br><br>DESCRIPTION: Partial Sale on 10/20/22 | JT    | \$15,001 - \$50,000   | Dividends                   | \$201 - \$1,000   | <input type="checkbox"/> |
| Invesco FTSE RAFI US [MF]                                                | JT    | \$15,001 - \$50,000   | Dividends                   | \$201 - \$1,000   | <input type="checkbox"/> |
| Invesco MSCI EAFI Small [MF]                                             | JT    | \$50,001 - \$100,000  | Dividends                   | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Invesco Variable Rate [MF]                                               | JT    | \$15,001 - \$50,000   | Dividends                   | \$1,001 -         | <input type="checkbox"/> |

| Asset                                                  | Owner | Value of Asset          | Income Type(s)           | Income              | Tx. > \$1,000?                      |
|--------------------------------------------------------|-------|-------------------------|--------------------------|---------------------|-------------------------------------|
|                                                        |       |                         |                          | \$2,500             | <input type="checkbox"/>            |
| iShares 500 S&P Growth [EF]                            | JT    | \$100,001 - \$250,000   | Capital Gains, Dividends | \$5,001 - \$15,000  | <input type="checkbox"/>            |
| iShares Core S&P Small Cap ETF-Account 1 [EF]          |       | \$100,001 - \$250,000   | Dividends                | \$1,001 - \$2,500   | <input type="checkbox"/>            |
| DESCRIPTION: Partial sale 2/4/21                       |       |                         |                          |                     |                                     |
| iShares MSCI Emerging Markets ex China ETF (EMXC) [EF] | JT    | \$15,001 - \$50,000     | Dividends                | \$201 - \$1,000     | <input type="checkbox"/>            |
| iShares MSCI Growth [EF]                               | JT    | \$50,001 - \$100,000    | Dividends                | \$1,001 - \$2,500   | <input type="checkbox"/>            |
| DESCRIPTION: Purchase on 11/9/23                       |       |                         |                          |                     |                                     |
| iShares Nasdaq Biotechnology [EF]                      | JT    | \$15,001 - \$50,000     | Dividends                | \$1 - \$200         | <input type="checkbox"/>            |
| iShares TR MSCI EAFE [EF]                              | JT    | \$15,001 - \$50,000     | Dividends                | \$1,001 - \$2,500   | <input checked="" type="checkbox"/> |
| DESCRIPTION: Partial sale 7/8/25                       |       |                         |                          |                     |                                     |
| Oppenheimer Global S [MF]                              | JT    | \$50,001 - \$100,000    | Dividends                | \$1,001 - \$2,500   | <input type="checkbox"/>            |
| PGIM HIGH YIELD Z [MF]                                 | JT    | \$15,001 - \$50,000     | Dividends                | \$201 - \$1,000     | <input type="checkbox"/>            |
| REAL ESTATE SELECT SCTR [EF]                           | JT    | \$1,001 - \$15,000      | Capital Gains, Dividends | \$5,001 - \$15,000  | <input type="checkbox"/>            |
| DESCRIPTION: Partial sale on 11/9/23                   |       |                         |                          |                     |                                     |
| Rental Property 32nd Street, Sacramento, CA [RP]       | JT    | \$500,001 - \$1,000,000 | Rent                     | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| LOCATION: Sacramento, CA, US                           |       |                         |                          |                     |                                     |
| Rental Property 36th Street, Sacramento, CA [RP]       | JT    | \$500,001 - \$1,000,000 | Rent                     | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| LOCATION: Sacramento, CA, US                           |       |                         |                          |                     |                                     |
| Rental Property 39th Street, Sacramento, CA [RP]       | JT    | \$500,001 - \$1,000,000 | Rent                     | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| LOCATION: Sacramento, CA, US                           |       |                         |                          |                     |                                     |
| Rental Property 43rd Street, Sacramento, CA [RP]       | JT    | \$500,001 -             | Rent                     | \$15,001 -          | <input type="checkbox"/>            |

| Asset                                         | Owner | Value of Asset            | Income Type(s) | Income               | Tx. > \$1,000?                      |
|-----------------------------------------------|-------|---------------------------|----------------|----------------------|-------------------------------------|
|                                               |       | \$1,000,000               |                | \$50,000             | <input type="checkbox"/>            |
| LOCATION: Sacramento, CA, US                  |       |                           |                |                      |                                     |
| Rental Property 4th St DC [RP]                | JT    | \$500,001 - \$1,000,000   | Rent           | \$5,001 - \$15,000   | <input type="checkbox"/>            |
| LOCATION: Washington/ DC, DC, US              |       |                           |                |                      |                                     |
| Rental Property Broadway, Sacramento, CA [RP] | JT    | \$500,001 - \$1,000,000   | Rent           | \$15,001 - \$50,000  | <input type="checkbox"/>            |
| LOCATION: Sacramento, CA, US                  |       |                           |                |                      |                                     |
| Rental Property P Street, Sacramento, CA [RP] | JT    | \$1,000,001 - \$5,000,000 | Rent           | \$50,001 - \$100,000 | <input type="checkbox"/>            |
| LOCATION: Sacramento, CA, US                  |       |                           |                |                      |                                     |
| Rental Property U Street, Sacramento CA [RP]  | JT    | \$500,001 - \$1,000,000   | Rent           | \$15,001 - \$50,000  | <input type="checkbox"/>            |
| LOCATION: Sacramento/ Sacramento, CA, US      |       |                           |                |                      |                                     |
| Rental Property U Street, Sacramento, CA [RP] | JT    | \$500,001 - \$1,000,000   | Rent           | \$15,001 - \$50,000  | <input type="checkbox"/>            |
| LOCATION: Sacramento, CA, US                  |       |                           |                |                      |                                     |
| Rental Property V Street, Sacramento, CA [RP] | JT    | \$500,001 - \$1,000,000   | Rent           | \$15,001 - \$50,000  | <input type="checkbox"/>            |
| LOCATION: Sacramento, CA, US                  |       |                           |                |                      |                                     |
| Schwab Fixed Income Fund [MF]                 | SP    | \$100,001 - \$250,000     | Dividends      | \$2,501 - \$5,000    | <input type="checkbox"/>            |
| Schwab Checking [BA]                          | JT    | \$15,001 - \$50,000       | Dividends      | \$201 - \$1,000      | <input type="checkbox"/>            |
| Schwab Fundamental INL [EF]                   | JT    | \$50,001 - \$100,000      | Dividends      | \$2,501 - \$5,000    | <input checked="" type="checkbox"/> |
| DESCRIPTION: Purchase on 11/9/23              |       |                           |                |                      |                                     |
| Schwab Government Money Fund [MF]             | JT    | \$100,001 - \$250,000     | Interest       | \$2,501 - \$5,000    | <input type="checkbox"/>            |
| Schwab International [EF]                     | JT    | None                      | Dividends      | \$1,001 - \$2,500    | <input checked="" type="checkbox"/> |
| DESCRIPTION: Purchase on 3/24/23              |       |                           |                |                      |                                     |
| Schwab Muni Money Fund [BA]                   | JT    | \$50,001 - \$100,000      | Dividends      | \$201 - \$1,000      | <input checked="" type="checkbox"/> |

| Asset                                                               | Owner | Value of Asset        | Income Type(s)           | Income             | Tx. > \$1,000?                      |
|---------------------------------------------------------------------|-------|-----------------------|--------------------------|--------------------|-------------------------------------|
| DESCRIPTION: Partial Sale 3/17/2025                                 |       |                       |                          |                    |                                     |
| Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]     | JT    | \$100,001 - \$250,000 | Interest                 | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| DESCRIPTION: Purchase on 11/10/23 Partial Sale 3/17/2025            |       |                       |                          |                    |                                     |
| Schwab US Dividend [EF]                                             | JT    | None                  | Capital Gains, Dividends | \$201 - \$1,000    | <input checked="" type="checkbox"/> |
| DESCRIPTION: Full Sale on 10/1/2025                                 |       |                       |                          |                    |                                     |
| SPDR Bloomberg Emerging MRKT [MF]                                   | JT    | \$15,001 - \$50,000   | Dividends                | \$1,001 - \$2,500  | <input type="checkbox"/>            |
| DESCRIPTION: purchase                                               |       |                       |                          |                    |                                     |
| SPDR S&P 500 ETF [EF]                                               | JT    | \$50,001 - \$100,000  | Dividends                | \$201 - \$1,000    | <input type="checkbox"/>            |
| State Street Financial Select Sector SPDR ETF (XLF) [EF]            | JT    | \$50,001 - \$100,000  | Dividends                | \$1,001 - \$2,500  | <input type="checkbox"/>            |
| DESCRIPTION: added to the position on 2/18/22                       |       |                       |                          |                    |                                     |
| State Street Industrial Select Sector SPDR ETF (XLI) [EF]           | JT    | \$1,001 - \$15,000    | Dividends                | \$1 - \$200        | <input type="checkbox"/>            |
| State Street Technology Select Sector SPDR ETF (XLK) [EF]           | JT    | \$50,001 - \$100,000  | Dividends                | \$201 - \$1,000    | <input checked="" type="checkbox"/> |
| DESCRIPTION: Purchased additional on 11/9/23 Partial Sale 10/1/2025 |       |                       |                          |                    |                                     |
| State Street Utilities Select Sector SPDR ETF (XLU) [EF]            |       | \$15,001 - \$50,000   | Dividends                | \$201 - \$1,000    | <input checked="" type="checkbox"/> |
| DESCRIPTION: Purchased 3/17/2025                                    |       |                       |                          |                    |                                     |
| TPMG Conservative [MF]                                              | SP    | \$250,001 - \$500,000 | None                     |                    | <input type="checkbox"/>            |
| TPMG Mod- Account 2 [MF]                                            | SP    | \$100,001 - \$250,000 | None                     |                    | <input type="checkbox"/>            |
| TPMG Moderate Account 1 [MF]                                        | SP    | \$250,001 - \$500,000 | None                     |                    | <input type="checkbox"/>            |
| VANGUARD CA INTERM-TERM TRE [MF]                                    | JT    | \$250,001 - \$500,000 | Dividends                | \$2,501 - \$5,000  | <input type="checkbox"/>            |
| DESCRIPTION: Purchased on 2/5/21 with a partial sale on 8/30/21     |       |                       |                          |                    |                                     |
| Vanguard Consumer Staples ETF (VDC) [EF]                            | JT    | \$15,001 - \$50,000   | Dividends                | \$201 - \$1,000    | <input type="checkbox"/>            |

| Asset                                                                    | Owner | Value of Asset      | Income Type(s) | Income             | Tx. > \$1,000?                      |
|--------------------------------------------------------------------------|-------|---------------------|----------------|--------------------|-------------------------------------|
| DESCRIPTION: Purchase on 10/23/24 Purchase on 3/17/2025                  |       |                     |                |                    |                                     |
| Vanguard FTSE All World Ex US ETF (VEU) [EF]                             | JT    | \$15,001 - \$50,000 | Dividends      | \$1,001 - \$2,500  | <input type="checkbox"/>            |
| DESCRIPTION: Asset purchased 3/24/23                                     |       |                     |                |                    |                                     |
| Vanguard FTSEEuropean ETF (VGK) [EF]                                     | JT    | \$15,001 - \$50,000 | Dividends      | \$1,001 - \$2,500  | <input type="checkbox"/>            |
| Vanguard Health Care [MF]                                                | JT    | \$1,001 - \$15,000  | Dividends      | \$1 - \$200        | <input type="checkbox"/>            |
| Vanguard High Yeild Corp [MF]                                            | JT    | \$15,001 - \$50,000 | Dividends      | \$1,001 - \$2,500  | <input type="checkbox"/>            |
| DESCRIPTION: partial sale                                                |       |                     |                |                    |                                     |
| Vanguard Inflation Protected Securities Fund Admiral Shares (VAIPX) [MF] | JT    | \$1,001 - \$15,000  | Dividends      | \$201 - \$1,000    | <input checked="" type="checkbox"/> |
| DESCRIPTION: Purchase 3/17/2025                                          |       |                     |                |                    |                                     |
| Walt Disney Company (DIS) [ST]                                           | JT    | None                | Dividends      | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| DESCRIPTION: Full sale 11/3/2025                                         |       |                     |                |                    |                                     |
| WASATCH ULTRA GROWTH INS [MF]                                            | JT    | None                | Dividends      | \$2,501 - \$5,000  | <input checked="" type="checkbox"/> |
| Wells Fargo Checking [BA]                                                | JT    | \$15,001 - \$50,000 | Interest       | \$1 - \$200        | <input type="checkbox"/>            |
| Wells Fargo Savings [BA]                                                 | JT    | \$15,001 - \$50,000 | Interest       | \$1 - \$200        | <input type="checkbox"/>            |

\* 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?                 |
|------------------------------------------------------|-------|------------|-------------|---------------------|-------------------------------------|
| iShares Core MSCI EAFE ETF (IEFA) [EF]               | JT    | 07/08/2026 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Schwab International Opportunities Fund (SWMIX) [MF] | JT    | 10/01/2025 | S           | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |

| Asset                                                                    | Owner | Date       | Tx. Type    | Amount                | Cap. Gains > \$200?                 |
|--------------------------------------------------------------------------|-------|------------|-------------|-----------------------|-------------------------------------|
| Schwab Municipal Money Fund - Investor Shares (SWTXX) [MF]               | JT    | 03/17/2025 | S (partial) | \$15,001 - \$50,000   | <input type="checkbox"/>            |
| Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]          |       | 03/17/2025 | S (partial) | \$50,001 - \$100,000  | <input checked="" type="checkbox"/> |
| State Street Technology Select Sector SPDR ETF (XLK) [EF]                | JT    | 10/01/2025 | S (partial) | \$1,001 - \$15,000    | <input checked="" type="checkbox"/> |
| Walt Disney Company (DIS) [ST]                                           | JT    | 11/03/2025 | S           | \$100,001 - \$250,000 | <input checked="" type="checkbox"/> |
| Wasatch Ultra Growth Fund Institutional Class (WGMCX) [MF]               | JT    | 03/17/2025 | S           | \$15,001 - \$50,000   | <input checked="" type="checkbox"/> |
| Schwab Dividend Equity Fund - Select Shares (SWDSX) [MF]                 | JT    | 10/01/2025 | S           | \$1,001 - \$15,000    | <input checked="" type="checkbox"/> |
| Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]          | JT    | 10/01/2025 | P           | \$15,001 - \$50,000   |                                     |
| State Street Utilities Select Sector SPDR ETF (XLU) [EF]                 | JT    | 03/17/2025 | P           | \$15,001 - \$50,000   |                                     |
| Vanguard Inflation Protected Securities Fund Admiral Shares (VAIPX) [MF] | JT    | 03/17/2025 | P           | \$1,001 - \$15,000    |                                     |
| Vanguard Consumer Staples ETF (VDC) [EF]                                 | JT    | 03/17/2025 | P           | \$1,001 - \$15,000    |                                     |

\* For the complete list of asset type abbreviations, please visit <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    | Shellpoint Mortgage | November 2020 | Mortgage on Rental Property, Washington DC | \$250,001 - \$500,000 |
| JT    | NewRez LLC          | January 2013  | Mortgage ,Washington DC                    | \$250,001 - \$500,000 |
| JT    | NewRez LLC          | June 2008     | Mortgage on Rental, Sacramento, CA         | \$50,001 -            |

| Owner | Creditor             | Date Incurred | Type                                | Amount of Liability   |
|-------|----------------------|---------------|-------------------------------------|-----------------------|
|       |                      |               |                                     | \$100,000             |
| JT    | NewRez LLC           | June 2006     | Mortgage on Rental Property, Sac CA | \$50,001 - \$100,000  |
| JT    | Bank of America      | March 2008    | Mortgage on Rental, Sacramento, CA  | \$50,001 - \$100,000  |
| JT    | Guild Mortgage       | November 2009 | Mortgage on Rental, Sacramento, CA  | \$100,001 - \$250,000 |
| JT    | Guild Mortgage       | November 2008 | Morgage, Elk Grove, CA              | \$100,001 - \$250,000 |
| JT    | Wells Fargo Mortgage | April 2016    | Rental Property, Sacramento CA      | \$100,001 - \$250,000 |
| JT    | Freedom Mortgage     | June 2011     | Mortgage on Rental Property, Sac CA | \$100,001 - \$250,000 |

### SCHEDULE E: POSITIONS

| Position                       | Name of Organization    |
|--------------------------------|-------------------------|
| Clinical Professor of Medicine | University of CA, Davis |
| CEO, President                 | Mango Management Inc    |

### 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?                             |
| Taipei Economic & Cultural Representative Office in the U.S. | 06/13/2025 | 06/18/2025 | Washington, D.C. - Taipei - Sacramento                   | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Embassy of India/Ministry of Foreign Affairs, India          | 09/19/2025 | 09/27/2025 | Washington, D.C. - New Delhi - Bombay - Washington, D.C. | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| The Aspen Institute, Inc.                                    | 05/24/2025 | 05/31/2025 | Sacramento - Málaga -                                    | 2                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

| Trip Details                                   |            |            |                                             |                  | Inclusions                          |                                     |                                     |
|------------------------------------------------|------------|------------|---------------------------------------------|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Source                                         | Start Date | End Date   | Itinerary                                   | Days at Own Exp. | Lodging?                            | Food?                               | Family?                             |
| Seville - San Francisco                        |            |            |                                             |                  |                                     |                                     |                                     |
| The Ripon Society & The Franklin Center        | 11/07/2025 | 11/11/2025 | Sacramento - Honolulu - Sacramento          | 1                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| U.S. Association of Former Members of Congress | 04/12/2025 | 04/18/2025 | San Francisco - Seoul - San Francisco       | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| CARE International & The Aspen Institute, Inc. | 08/07/2025 | 08/18/2025 | San Francisco - Livingstone - San Francisco | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| United Nations Foundation                      | 08/22/2025 | 08/29/2025 | Sacramento - Ulaanbaatar - Sacramento       | 0                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

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. Ami Bera , 08/12/2026