



Filing ID #10080012

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Kaela Jo Berg
Status: Congressional Candidate
State/District: MN02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2026
Filing Date: 07/14/2026
Period Covered: 01/01/2025– 07/14/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Lifecycle 2040 Fund ⇒ 401(k) [OP]		\$50,001 - \$100,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$15,001 - \$50,000
DESCRIPTION: Kaela Berg and Endeavor Air both make contributions to 401k account. The income is comprised of Kaela Berg's contributions, Endeavor Air's contributions, and investment gains.					
Target Retirement 2040 Fund Class P ⇒ Minnesota Unclassified Retirement Plan [OT]		\$50,001 - \$100,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$5,001 - \$15,000
DESCRIPTION: This is an Unclassified Employee Retirement Plan through the State of Minnesota to the legislators.					

* 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 Current Year to Filing	Amount Preceding Year
Endeavor Air	Employee	\$3,399.24	\$9,586.56
State of Minnesota	Elected Official Salary	\$38,974.50	\$64,774.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
State Representative	Minnesota House of Representatives
Flight Attendant	Endeavor Air

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2026	Endeavor Air and myself	I take a leave of absence during the months of active session in the Minnesota State House of Representatives. The dates of active session this term were February 17, 2026 through May 18, 2026.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Fidelity Lifecycle 2040 Fund
- Target Retirement 2040 Fund Class P

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Kaela Jo Berg , 07/14/2026