



Filing ID #10072803

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Dr. Richard Dr Pan
Status: Congressional Candidate
State/District: CA06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 11/13/2025
Period Covered: 01/01/2024– 10/14/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|---------------------------|-----------------|-------------------------------|-------------------------|
| Checking [BA] | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Savings WW [BA] | SP | \$50,001 - \$100,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| U.S. Savings Bonds [GS] | JT | \$1,001 - \$15,000 | Interest | None | None |
| UC Retirement Plan [DB] | | Undetermined | None | | |
| Wang Pan California Properties, LLC, 100% Interest [RP] | JT | \$1,000,001 - \$5,000,000 | Rent | \$50,001 - \$100,000 | \$100,001 - \$1,000,000 |
| LOCATION: Sacramento, CA, US | | | | | |
| DESCRIPTION: Commercial Real Estate | | | | | |
| Wen-Li Wang DDS, Inc., 100% Interest [OL] | SP | \$100,001 - \$250,000 | Dental services | \$100,001 - \$1,000,000 | \$100,001 - \$1,000,000 |
| LOCATION: Sacramento, CA, US | | | | | |
| DESCRIPTION: Dental Practice | | | | | |
| 401(k) RP ⇒ Fidelity 500 Index Fund (FXAIX) [MF] | | \$100,001 - \$250,000 | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|---------------------------|--------------------------|-------------------------------|-----------------------|
| 401(k) RP ⇒ Fidelity Diversified International Fund Class K (FDIKX) [MF] | | \$100,001 - \$250,000 | Tax-Deferred | | |
| 401(k) RP ⇒ Fidelity Small Cap Value Fund (FCPVX) [MF] | | \$100,001 - \$250,000 | Tax-Deferred | | |
| 401(k) RP ⇒ PIMCO Funds Total Return Fund Institutional Shares (PTTRX) [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| 403(b) RP ⇒ UC Pathway 2035 [OT] | | \$1,000,001 - \$5,000,000 | Tax-Deferred | | |
| DESCRIPTION: The Fund is a custom strategy fund offered by the University of California Office of the Chief Investment Officer of the Regents: available exclusively to UC Retirement Savings Program participants. | | | | | |
| 457(b) RP ⇒ UC Diversified International Fund [OT] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| DESCRIPTION: The Fund is a custom strategy fund offered by the University of California Office of the Chief Investment Officer of the Regents: available exclusively to UC Retirement Savings Program participants. | | | | | |
| 457(b) RP ⇒ UC Domestic Equity Index Fund [OT] | | \$500,001 - \$1,000,000 | Tax-Deferred | | |
| DESCRIPTION: The Fund is a custom strategy fund offered by the University of California Office of the Chief Investment Officer of the Regents: available exclusively to UC Retirement Savings Program participants. | | | | | |
| Fidelity Brokerage ⇒ Fidelity California AMT Tax-Free Money Market Fund (FSPXX) [MF] | JT | \$15,001 - \$50,000 | Dividends | \$1,001 - \$2,500 | \$1,001 - \$2,500 |
| Fidelity Brokerage ⇒ Fidelity Government Money Market Fund (SPAXX) [MF] | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Fidelity Brokerage WW ⇒ Fidelity 500 Index Fund (FXAIX) [MF] | SP | \$50,001 - \$100,000 | Capital Gains, Dividends | \$2,501 - \$5,000 | \$1,001 - \$2,500 |
| Fidelity Brokerage WW ⇒ Fidelity Long-Term Treasury Bond Index Fund (FNBGX) [MF] | SP | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$1 - \$200 |
| Fidelity Brokerage WW ⇒ Fidelity Short-Term Bond Index Fund (FNSOX) [MF] | SP | None | Dividends | None | \$201 - \$1,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|--------------------------|-------------------------------|-----------------------|
| Fidelity Brokerage WW ⇒ Fidelity Stock Selector Small Cap Fund (FDSCX) [MF] | SP | \$15,001 - \$50,000 | Capital Gains, Dividends | \$1 - \$200 | \$201 - \$1,000 |
| Fidelity Brokerage WW ⇒ Fidelity Total International Index Fund (FTIHX) [MF] | SP | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| IRA AP ⇒ Fidelity Government Money Market Fund (SPAXX) [MF] | DC | \$1,001 - \$15,000 | Tax-Deferred | | |
| IRA RP ⇒ Fidelity Oxford Street Trust: Fidelity Four-In-One Index Fund (FFNOX) [MF] | | \$100,001 - \$250,000 | Tax-Deferred | | |
| IRA WW ⇒ Fidelity 500 Index Fund (FXAIX) [MF] | SP | \$250,001 - \$500,000 | Tax-Deferred | | |
| IRA WW ⇒ Fidelity Advisor Strategic Income Fund (FADMX) [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | |
| IRA WW ⇒ Fidelity International Value Fund (FIVLX) [MF] | SP | \$50,001 - \$100,000 | Tax-Deferred | | |
| IRA WW ⇒ Fidelity Small Cap Discovery Fund (FSCRX) [MF] | SP | \$50,001 - \$100,000 | Tax-Deferred | | |
| IRA WW ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAZ) [MF] | SP | \$50,001 - \$100,000 | Tax-Deferred | | |
| ScholarShare529 ⇒ 2028/2029 Enrollment Portfolio Passive [5F] | JT | \$50,001 - \$100,000 | None | | |
| LOCATION: CA | | | | | |
| ScholarShare529 ⇒ Enrollment Year Portfolio Passive [5F] | JT | \$50,001 - \$100,000 | None | | |
| LOCATION: CA | | | | | |
| UC DCP RP ⇒ UC Domestic Equity Index [OT] | | \$100,001 - \$250,000 | Tax-Deferred | | |
| DESCRIPTION: The Fund is a custom strategy fund offered by the University of California Office of the Chief Investment Officer of the Regents: available exclusively to UC Retirement Savings Program participants. | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|--------------------|----------------|-------------------------------|-----------------------|
| UC DCP RP ⇒ UC International Equity Index Fund [OT] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: The Fund is a custom strategy fund offered by the University of California Office of the Chief Investment Officer of the Regents: available exclusively to UC Retirement Savings Program participants. | | | | | |

* 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 |
|-------------------------------------|------------------------|-------------------------------|-----------------------|
| University of California, Davis | Salary | \$69,917.00 | \$70,224.00 |
| State of California | Per diem | \$4,000.00 | \$4,000.00 |
| American Medical Association | Salary | \$205,628.00 | \$195,180.00 |
| AAP-CA Chapter 2 | Honorarium | N/A | \$1,000.00 |
| Lucile Packard Foundation | Honorarium | N/A | \$2,000.00 |
| The Upstate Foundation, Inc. | Honorarium | N/A | \$1,500.00 |
| Wen-Li Wang DDS, Inc. | Spouse salary | N/A | N/A |
| University of California, Riverside | Independent contractor | N/A | \$46,875.00 |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|---------------------------|---------------|------------------------------|-------------------------|
| JT | The Golden 1 Credit Union | various | Credit card | \$10,000 - \$15,000 |
| JT | Five Star Bank | July 2007 | Commercial property mortgage | \$500,001 - \$1,000,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|--|---------------------------------|
| Senior Lecturer | University of California, Davis |
| Physician Advisor to Medical Education | American Medical Association |
| Senior Policy Advisor | AAPI Data |

| Position | Name of Organization |
|--------------------|--|
| Board Chair | United Way California Capital Region |
| Board of Directors | Improve Your Tomorrow |
| Board of Directors | California State Railroad Museum Foundation |
| Member | Wang Pan California Properties, LLC |
| Board of Directors | North Natomas Business Park Owners Association |
| Secretary | Wen-Li Wang DDS, Inc. |

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|---------------|--------------------|--|
| December 2023 | UC Retirement Plan | Enrolled in University of California Retirement Plan to receive a defined benefit pension upon retirement. |

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

| Source (Name and Address) | Brief Description of Duties |
|---|------------------------------------|
| Wen-Li Wang DDS, Inc unknown patients (Sacramento, CA, US) | Receipt of dental services |

COMMENTS: Patient information is confidential under the Health Insurance Portability and Accountability Act of 1996 ("HIPPA"). To the best of my knowledge, I have not and will not make, participate in making, or in any way attempt to use my official position to influence a governmental decision when to do so constitute or would constitute a violation of law.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Fidelity Brokerage (Owner: JT)
- IRA RP
- 403(b) RP
- UC DCP RP
DESCRIPTION: UC Deferred Compensation Plan
- 457(b) RP
- 401(k) RP
- IRA AP (Owner: DC)
- IRA WW (Owner: SP)
- Fidelity Brokerage WW (Owner: SP)
- ScholarShare529 (Owner: JT)
LOCATION: CA

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: Dr. Richard Dr Pan , 11/13/2025