



Filing ID #10072437

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Boris "Bo" Wiedenfeld-Needham
Status: Congressional Candidate
State/District: OR04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 09/13/2025
Period Covered: 01/01/2024– 08/14/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Coinbase [CT]		\$1,001 - \$15,000	None		
First Trust NASDAQ Clean Edge Smart Grid Infrastructure Index Fund (GRID) [EF]		\$1,001 - \$15,000	None		
Charles Schwab ⇒ 3M Company Common Stock (MMM) [ST]	SP	\$1 - \$1,000	None		
Charles Schwab ⇒ AB Sustainable Global Thematic Fund - A (ALTFX) [MF]	SP	\$15,001 - \$50,000	None		
Charles Schwab ⇒ Jonesboro State CD [BA]	SP	\$1 - \$1,000	None		
Charles Schwab ⇒ MSCI Inc. Common Stock (MSCI) [ST]	SP	\$1,001 - \$15,000	None		
Charles Schwab ⇒ NeoGenomics, Inc. - Common Stock (NEO) [ST]	SP	\$1 - \$1,000	None		
Charles Schwab ⇒	SP	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Target 2040 Index Fund Institutional Shares (SWYGX) [MF]					
Charles Schwab ⇒ T. Rowe Price Retirement 2040 Fund (TRRDY) [MF]	SP	\$15,001 - \$50,000	None		
Charles Schwab ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]	SP	\$1,001 - \$15,000	None		
Charles Schwab ⇒ Thermo Fisher Scientific Inc Common Stock (TMO) [ST]	SP	\$1 - \$1,000	None		
Charles Schwab ⇒ VictoryShares US Small Mid Cap Value Momentum ETF (USVM) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
PEBB ⇒ Karen's retirement [DB]	SP	\$50,001 - \$100,000	Tax-Deferred		
Vanguard ⇒ Vanguard Target Retirement 2030 Fund (VTHR) [MF]		\$1,001 - \$15,000	None		
Victory Capital ⇒ Tessa's 529 [5F] LOCATION: TX	DC	\$15,001 - \$50,000	None		
Voya ⇒ Bo's IRA [DB] DESCRIPTION: through OLCC		\$15,001 - \$50,000	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 C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
University of Oregon	Salary	\$43,000.00	\$52,000.00
Bo's Wine Depot	Salary	\$43,000.00	\$52,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	cmg financial	June 2021	Home Mortgage	\$250,001 - \$500,000
JT	Nissan Financing	March 2022	Car Loan	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
CEO	Bo's Wine Depot

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- PEBB (Owner: SP)
DESCRIPTION: Individual retirement account managed by the Oregon Public Employees Benefit Board
- Victory Capital (Owner: DC)
LOCATION: TX
- Charles Schwab (Owner: SP)
DESCRIPTION: Roth
- Voya
- Vanguard

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: Boris "Bo" Wiedenfeld-Needham , 09/13/2025