



Filing ID #10070309

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Jim Salegui  
**Status:** Congressional Candidate  
**State/District:** CA01

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2025  
**Filing Date:** 05/23/2025  
**Period Covered:** 01/01/2024– 04/15/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$2,501 - \$5,000	\$1,001 - \$2,500
DESCRIPTION: Interest earned from bank accounts as reported by 1099-INT forms.					
JPMorgan Liquid Assets Money Market Fund Premier Shares (PJLXX) [MF]		\$100,001 - \$250,000	None		
DESCRIPTION: Money Market Mutual Fund					
401k with Former Employer ⇒ AT LifeStyle Aggressive [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Target retirement dated fund held in a 401k with a former employer. This asset does not have a searchable ticker symbol.					
401k with Former Employer ⇒ BlackRock LifePath Fund 2045 [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Target retirement date fund that does not carry a searchable ticker symbol.					
ROTH IRA ⇒ Fidelity Select Technology (FSPTX) [MF]		\$1,001 - \$15,000	None		
ROTH IRA ⇒ Select Enterprise Technology Services Portfolio (FBSOX) [MF]		\$1,001 - \$15,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Traditional IRA ⇒ Cash position [IH]		\$1,001 - \$15,000	None		
Traditional IRA ⇒ Dodge & Cox Stock Fund - Class I (DODGX) [MF]		\$1,001 - \$15,000	None		
Traditional IRA ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$50,001 - \$100,000	None		
Traditional IRA ⇒ Fidelity Europe Fund (FIEUX) [MF]		\$1,001 - \$15,000	None		
Traditional IRA ⇒ Fidelity Select Technology (FSPTX) [MF]		\$1,001 - \$15,000	None		
Traditional IRA ⇒ Fidelity Water Sustainability Fund (FLOWX) [MF]		\$15,001 - \$50,000	None		
Traditional IRA ⇒ Harbor Capital Appreciation Fund Insti Cl (HACAX) [MF]		\$15,001 - \$50,000	None		

\* 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

<b>Source</b>	<b>Type</b>	<b>Amount Current Year to Filing</b>	<b>Amount Preceding Year</b>
CUSO Financial Services	Salary	\$9,210.00	\$63,385.00
LPL Financial	Salary	\$15,840.00	N/A

## SCHEDULE D: LIABILITIES

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
	Rate, Inc	November 2024	Primary residence mortgage	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

None disclosed.

## **SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

## **SCHEDULE A INVESTMENT VEHICLE DETAILS**

- Traditional IRA
- ROTH IRA
- 401k with Former Employer

## **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:** Jim Salegui , 05/23/2025