



Filing ID #10067734

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Jim Costa  
**Status:** Member  
**State/District:** CA21

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 08/12/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Heartland Financial USA, Inc. (HTLF) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
James M. Costa Farms (Sole Proprietorship) [FA]		\$1,000,001 - \$5,000,000	Farm Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Fresno, CA, US DESCRIPTION: Farming operation					
Portuguese Fraternal Society of America [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Rental Home [RP]		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Washington, DC, US					
Rental Home [RP]		None	Rent	None	<input checked="" type="checkbox"/>
LOCATION: Fresno, CA, US					
United Security Bank [BA]		\$50,001 - \$100,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo Advisors 401(k) ⇒ American Funds Washington Mutual Investors Fund Class F-2 [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Baird Aggregate Bond Fund Class Institutional [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Baron Inv't Funds Trust Small Cap Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Baron Select Funds Emerging Markets FD [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Causeway International Value Fund - Institutional Class (CIVIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Dodge & Cox Stk FD [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Eaton Vance Income Fund of Boston Class I [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Eaton Vance South Carolina Municipal Income Fund Class C (ECSCX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ EuroPacific Growth Fund, Class F-2 Shs (AEPFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Goldman Sachs FS Treasury Instruments Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Invesco Developing Markets Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Mainstay Winslow Large CAP Growth Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ MFS SER TR 1 VALUE FD [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ PIMCO Commodities Plus Strategy FD CL [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo Advisors 401(k) ⇒ Pimco Commodity Real Return [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ ROWE T PRICE MID CAP GROWTH FUND [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ T Rowe Price Overseas Stock Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Victory Sycamore Small Co Oppty [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Virtus Ceredex Mid-Cap Value Equity Fund Class I [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo Advisors 401(k) ⇒ Washington Mutual Investors Fund Cl F-2 Shs (WMFFX) [MF]		06/13/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Washington Mutual Investors Fund Cl F-2 Shs (WMFFX) [MF]		12/20/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Washington Mutual Investors Fund Cl F-2 Shs (WMFFX) [MF]		03/06/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Baird Aggregate Bond Fund Institutional Class (BAGIX) [MF]		03/06/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Baron Small Cap Fund Inst Shs (BSFIX) [MF]		03/06/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Baron Small Cap Fund Inst Shs (BSFIX) [MF]		07/26/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒		03/06/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]			(partial)		<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]		07/26/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Dodge & Cox Stock Fund - Class I (DODGX) [MF]		03/06/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Dodge & Cox Stock Fund - Class I (DODGX) [MF]		07/26/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Dodge & Cox Stock Fund - Class I (DODGX) [MF]		12/20/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Eaton Vance Income Fd of Boston Insti Shs (EIBIX) [MF]		03/06/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Financial Square Treasury Instruments Fd - FST Shares (FTIXX) [MF]		01/12/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Financial Square Treasury Instruments Fd - FST Shares (FTIXX) [MF]		04/12/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Financial Square Treasury Instruments Fd - FST Shares (FTIXX) [MF]		10/11/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Invesco Developing Markets Fund Class Y (ODVYX) [MF]		03/06/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Invesco Developing Markets Fund Class Y (ODVYX) [MF]		07/26/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ NYLI Winslow Large Cap Growth Fund Class I (MLAIX) [MF]		03/06/2024	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ NYLI Winslow Large Cap Growth Fund Class I (MLAIX) [MF]		12/06/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ MFS Value Fund - Class I (MEIIX) [MF]		03/06/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo Advisors 401(k) ⇒ MFS Value Fund - Class I (MEIIX) [MF]		12/06/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Causeway International Value Fund - Institutional Class (CIVIX) [MF]		04/16/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Embark Commodity Strategy Fund Institutional Class (ECSWX) [MF]		07/26/2024	P	\$15,001 - \$50,000	
Wells Fargo Advisors 401(k) ⇒ EuroPacific Growth Fund, Class F-2 Shs (AEPFX) [MF]		04/15/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ PIMCO CommoditiesPLUS Strategy Fund Insti Cl (PCLIX) [MF]		03/06/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ PIMCO Commodity Real Return Strategy Class A (PCRAX) [MF]		03/06/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ PIMCO Commodity Real Return Strategy Class A (PCRAX) [MF]		07/26/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ T. Rowe Price Mid-Cap Growth Fund, Inc. (RPMGX) [MF]		07/26/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ T. Rowe Price Mid-Cap Growth Fund, Inc. (RPMGX) [MF]		12/06/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ T. Rowe Price Overseas Stock Fund (TROSX) [MF]		04/15/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ T. Rowe Price Overseas Stock Fund (TROSX) [MF]		12/06/2024	P	\$1,001 - \$15,000	
Wells Fargo Advisors 401(k) ⇒ Victory Sycamore Small Company Opportunity CL I (VSOIX) [MF]		03/06/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Wells Fargo Advisors 401(k) ⇒ Virtus Ceredex Mid-Cap Value Equity Fund I (SMVTX) [MF]		03/06/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo Advisors 401(k) ⇒ Virtus Ceredex Mid-Cap Value Equity Fund I (SMVTX) [MF]		12/19/2024	P	\$1,001 - \$15,000	
Rental Home [RP]		07/16/2024	S	\$500,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Fresno, CA, US					

\* 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
California Public Employee Retirement System	Legislative Pension	\$4,514.00
California Legislator Retirement System	Legislative Pension	\$9,416.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	The National Capital Bank	July 2006	Mortgage on Washington D.C. property	\$250,001 - \$500,000
	Premier Valley Bank	March 2019	Line of Credit	\$250,001 - \$500,000
	PNC Bank	August 2021	Mortgage on personal residence	\$250,001 - \$500,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member COMMENTS: Not compensated	The Maddy Institute, CA State University, Fresno
Advisory Council Member COMMENTS: Not compensated	The Congressional Hispanic Caucus Institute

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2005	Myself & California Public Employees Retirement Systems	Pension Plan Participation
January 2003	Myself & California Legislator Retirement Systems	Pension Plan Participation

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?
Yalta European Strategy	02/22/2024	02/25/2024	Fresno, CA - Kyiv, Ukraine - Fresno, CA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
American Israel Education Foundation	03/24/2024	03/29/2024	Washington, DC - Tel Aviv, Israel - Fresno, CA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fundacao Luso Americana Para o Desenvolvimento	06/15/2024	06/19/2024	Washington, DC - Lisbon, Portugal - Fresno, CA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The Aspen Institute, Inc.	08/10/2024	08/16/2024	San Francisco, CA - Dublin, Ireland - Fresno, CA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Yalta European Strategy	09/12/2024	09/16/2024	Washington, DC - Kyiv, Ukraine - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

◦ Wells Fargo Advisors 401(k)
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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. Jim Costa , 08/12/2025