



Filing ID #10052082

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Donald J. Bacon
Status: Member
State/District: NE02

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 05/14/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Athene Life Insurance (Whole) [WU]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Athene Life Insurance (Whole) [WU]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
COBALT Federal Credit Union [BA]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Ernest Hardison Farm [FA]	SP	\$500,001 - \$1,000,000	Rent	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Greenville, KY, US					
DESCRIPTION: Rent from my father-in-law's farm. Gift from my wife's dad.					
Franklin Mutual Shares fund - Class A ⇒ Franklin Mutual Shares Fund--Class A [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
LPL Financial ⇒ LPL Financial WSTAX Delaware Ivy Science and Tech CL A [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: .					
LPL Financial ⇒ WLGAIX Delaware Ivy Large Cap Growth Cl A [MF]		\$100,001 - \$250,000	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Principle ⇒ Principle Investments (Prin Life Time 2030 Inst Fund) [PE]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Pension Plan with University of Bellevue					
Prudential PruLife UL Protector ⇒ Prudential Life Insurance (Universal) [WU]		\$250,001 - \$500,000	None		<input type="checkbox"/>
USAA 529 College Savings Plan ⇒ USAA College Fund [5P]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: NV DESCRIPTION: The fund is divided up between age-based option moderate portfolio, aggressive growth portfolio, growth portfolio and moderately aggressive portfolio.					
Wells Fargo Checking and Savings [BA]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: My wife, Angie, has her name jointly on her Dad's account (Earnest Hardison) so she can help him pay bills. He passed away this last December and the funds are being divided between the siblings.					
Wells Fargo Checking and Savings [BA]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Joint checking and savings account					

* Asset class 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?
LPL Financial ⇒ WLGAX Delaware Ivy Large Cap Growth Cl A [IR]		12/5/2022	E	\$15,001 - \$50,000	
DESCRIPTION: Cap gains were reinvested into fund.					

* Asset class 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
United Way of the Midlands	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Foundation One Bank	July 2021	Building loan for future house to include land and construction	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Vice President	Local Chapter of Air Force Association
COMMENTS: Uncompensated	
Chaplain	Local Chapter of the Military Officers of America Association
COMMENTS: Uncompensated	
Board of Visitors	Air Force Academy

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2014	Myself and University of Bellevue	This was a pension plan when I was with University of Bellevue. I no longer contribute to it, but the pension is saved.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
AIPAC	06/26/2022	07/2/2022	Omaha - Tel Aviv, Israel - Omaha	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ripon Society	11/9/2022	11/14/2022	Omaha - Madrid, Spain - Washinton District of Columbia	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Franklin Mutual Shares fund - Class A
DESCRIPTION: My IRA
- LPL Financial
- Principle
DESCRIPTION: Bellevue University Retirement Plan
- Prudential PruLife UL Protector
DESCRIPTION: Life insurance on myself
- USAA 529 College Savings Plan (Owner: JT)
LOCATION: NV
DESCRIPTION: 529 Fund is for our granddaughter, Hadley Bacon

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. Donald J. Bacon , 05/14/2023