



Filing ID #10063351

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ed Case  
**Status:** Member  
**State/District:** HI01

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2023  
**Filing Date:** 02/3/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alliant Credit Union [BA]		\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Amazon.com, Inc. (AMZN) [ST]		\$250,001 - \$500,000	None		<input type="checkbox"/>
American Funds New Perspective RS [MF]		None	Dividends	Not Applicable	<input type="checkbox"/>
Apple Inc. (AAPL) [ST]		\$500,001 - \$1,000,000	Dividends	Not Applicable	<input type="checkbox"/>
Employees' Retirement System of the State of Hawai'i [DB]		Undetermined	Pension	\$5,001 - \$15,000	<input type="checkbox"/>
Fidelity Balanced (FBALX) [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
Fidelity Government Cash Reserves [MF]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
Harbor Capital Appreciation Fund 1 [MF]		None	Dividends	Not Applicable	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Hawaii State Federal Credit Union [BA]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Johnson & Johnson (JNJ) [ST]		\$50,001 - \$100,000	Dividends	Not Applicable	<input type="checkbox"/>
JP Morgan Mid Cap Value L [MF]		None	Dividends	Not Applicable	<input type="checkbox"/>
Marin Software Incorporated (MRIN) [ST]		\$1 - \$1,000	Dividends	Not Applicable	<input type="checkbox"/>
Microsoft Corporation (MSFT) [ST]		\$100,001 - \$250,000	Dividends	Not Applicable	<input type="checkbox"/>
NT S&P 500 Index NL T3 [MF]		None	Dividends	Not Applicable	<input type="checkbox"/>
PGIM Global Real Estate Z [MF]		None	Dividends	Not Applicable	<input type="checkbox"/>
Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
T. Rowe Price Retirement 2015 [MF]		None	Dividends	Not Applicable	<input type="checkbox"/>
T. Rowe Price Retirement 2025 [MF]		None	Dividends	Not Applicable	<input type="checkbox"/>
T. Rowe Price Retirement 2035 [MF]		None	Dividends	Not Applicable	<input type="checkbox"/>
T. Rowe Price Retirement 2040 [MF]		None	Dividends	Not Applicable	<input type="checkbox"/>
UAL Stock Fund [MF]		\$1 - \$1,000	Dividends	Not Applicable	<input type="checkbox"/>
US Equity Index [MF]		\$250,001 - \$500,000	Dividends	Not Applicable	<input type="checkbox"/>
Vanguard 500 Index Admiral [MF]		None	Dividends	Not Applicable	<input type="checkbox"/>
Vanguard Balanced Index Fund [MF]		None	Dividends	Not Applicable	<input type="checkbox"/>
Vanguard Extended Duration Treasury Index [EF]		None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Federal Money Market Fund [MF]	None		Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard FTSE Developed Mkts [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Health Care Admiral CL [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard High Dividend Yield [EF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Intl Divid Apprec [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Long Term Treasury [EF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard Target 2015 [MF]		\$100,001 - \$250,000	Dividends	Not Applicable	<input type="checkbox"/>
Vanguard Target 2020 [MF]		\$100,001 - \$250,000	Dividends	Not Applicable	<input type="checkbox"/>
Vanguard Total Bond Market [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

\* 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?
Harbor Capital Appreciation Fund Insti Cl (HACAX) [MF]	JT	05/16/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
COMMENTS: Proceeds were rolled over into filer's Thrift Savings Plan account.					
JPMorgan Mid Cap Value Fund-R6 (JMVYX) [MF]	JT	05/16/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
COMMENTS: Proceeds rolled over into filer's Thrift Savings Plan account.					
New Perspective Fund, Class R-6 Shares (RNPGX) [MF]	JT	04/28/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Also known as American Funds New Perspective RS; same as reported in Schedule A.					
COMMENTS: Proceeds were rolled over into filer's Thrift Savings Plan account.					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
NT S&P 500 Index NL T3 [OT]	JT	05/16/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: US					
DESCRIPTION: Index fund; same as reported in Schedule A.					
COMMENTS: Proceeds rolled over into filer's Thrift Savings Plan account.					
T. Rowe Price Retirement 2025 Fund - I Class (TREHX) [MF]	JT	05/16/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
COMMENTS: Proceeds rolled over into filer's Thrift Savings Plan account.					
T. Rowe Price Retirement 2035 Fund - I Class (TRFJX) [MF]	JT	04/28/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
COMMENTS: Proceeds rolled over into filer's Thrift Savings Plan account.					
T. Rowe Price Retirement 2040 Fund - I Class (TRHDX) [MF]	JT	05/16/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
COMMENTS: Proceeds rolled over into filer's Thrift Savings Plan account.					
Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	JT	04/28/2023	S	\$100,001 - \$250,000	<input type="checkbox"/>
COMMENTS: Proceeds rolled over into filer's Thrift Savings Plan account.					
Vanguard Balanced Index Fd Admiral Shs (VBIAX) [MF]	JT	04/30/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
COMMENTS: Proceeds rolled over into filer's Thrift Savings Plan account.					
Vanguard Extended Duration Treasury ETF (EDV) [EF]	JT	06/30/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard Federal Money Market Fund [OT]	JT	06/30/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: US					
DESCRIPTION: This is a MF (same as reported in Schedule A).					
Vanguard Long-Term Treasury ETF (VGLT) [EF]	JT	06/30/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

None disclosed.

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## 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?
United Nations Foundation/Eleanor Crook Foundation	06/24/2023	06/29/2023	Washington, D.C. - Dar es Salaam, Tanzania - Washington, D.C.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ripon Society/Franklin Center for Global Policy Exchange	08/6/2023	08/11/2023	Washington, D.C. - London, U.K. - N/A	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
American Lands Project	07/29/2023	08/4/2023	Washington, D.C. - Arctic National Wildlife Refuge, Alaska - Washington, D.C.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
United Nations Foundation	10/22/2023	10/23/2023	Washington, D.C. - New York, N.Y. - Washington, D.C.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## 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. Ed Case , 02/3/2025