



Filing ID #10072958

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Young Kim  
**Status:** Member  
**State/District:** CA40

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2022  
**Filing Date:** 12/08/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo Bank [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Personal checking & savings					
AIG Life Insurance ⇒ AIG Life Insurance [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab IRA ⇒ Brokerage Sweep Account [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA Emerging Markets Core [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA Global Real Estate [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA International Core Equity [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA International Small [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
DFA International Value [MF]					<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA Intl Hi Relativ Profitability [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA Investment Grade [MF]		\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA Short Term Extened Quality Port [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA Short-Duration Real [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA US Core Equity 2 [MF]		\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA US Hi Relativ Profitability [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA US Large Cap Value [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA US Small Cap [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA US Targeted Value [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Mass Mutual ⇒ Mass Mutual (Fixed Annuity) [FN]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Tax sheltered annuity					

\* 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

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Charles Schwab IRA ⇒ DFA Investment Grade [MF]		02/01/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab IRA ⇒ DFA Investment Grade [MF]		03/22/2022	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ DFA Investment Grade [MF]		04/06/2022	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ DFA Investment Grade [MF]		10/12/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA Emerging Markets Core [MF]		03/01/2022	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ DFA Emerging Markets Core [MF]		05/23/2022	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ DFA Emerging Markets Core [MF]		11/01/2022	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ DFA US Targeted Value [MF]		03/01/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA US Targeted Value [MF]		11/01/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA US Large Cap Value [MF]		03/22/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA Global Real Estate [MF]		04/06/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA International Value [MF]		05/23/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA Intl Hi Relativ Profitability [MF]		09/06/2022	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ DFA US Core Equity 2 [MF]		09/06/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA US Core Equity 2 [MF]		11/01/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒		12/12/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DFA US Core Equity 2 [MF]					
Charles Schwab IRA ⇒ DFA Global Real Estate [MF]		10/12/2022	P	\$1,001 - \$15,000	

\* 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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Loan Depot	March 2019	Mortgage	\$250,001 - \$500,000

## 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?
U.S. Association of Former Members of Congress (FMC)	07/04/2022	07/10/2022	Los Angeles, CA - Seoul, South Korea - Los Angeles, California	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
American Israel Education Foundation	02/18/2022	02/26/2022	Los Angeles CA - Israel - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Republican Main Street Partnership	03/03/2022	03/05/2022	Washington DC - San Antonio TX - 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**

- Charles Schwab IRA
- AIG Life Insurance  
DESCRIPTION: Whole Life Insurance Cash Accumulated Value
- Mass Mutual  
LOCATION: US

## **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. Young Kim , 12/08/2025