



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Ami Bera
Status: Member
State/District: CA06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 08/06/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ABERDEEN STNDRD PHYSCL [EF] DESCRIPTION: Partial Sale on 11/9/23	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
American Century CA [MF]	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Elk Grove Commerce Bank [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Energy Select Sector SPDR [MF] DESCRIPTION: Purchase on 2/24/22	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
FIDELITY MSCI COMM SRV [EF] DESCRIPTION: Partial Sale on 10/20/22	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Golden One Credit Union [BA] DESCRIPTION: Account Closed	JT	None	Interest	None	<input checked="" type="checkbox"/>
Invesco FTSE RAFI US [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Invesco MSCI EAFI Small [MF]	JT	\$50,001 -	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$100,000			<input type="checkbox"/>
Invesco Variable Rate [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
iShares 500 S&P Growth [EF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
iShares Core S&P Small Cap ETF-Account 1 [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: Partial sale 2/4/21					
Ishares ESG AWARE MSCI [MF]	JT	None	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Asset sold on 11/9/23					
Ishares Global Clean [MF]	JT	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Full Sale on 10/23/24					
iShares MSCI Emerging Markets ex China ETF (EMXC) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares MSCI Growth [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: Purchase on 11/9/23					
iShares Nasdaq Biotechnology [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares TR MSCI EAFE [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Oppenheimer Global S [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
PGIM HIGH YIELD Z [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
REAL ESTATE SELECT SCTR [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Partial sale on 11/9/23					
Rental Property 32nd Street, Sacramento, CA [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Sacramento, CA, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rental Property 36th Street, Sacramento, CA [RP] LOCATION: Sacramento, CA, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Rental Property 39th Street, Sacramento, CA [RP] LOCATION: Sacramento, CA, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Rental Property 43rd Street, Sacramento, CA [RP] LOCATION: Sacramento, CA, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Rental Property 4th St DC [RP] LOCATION: Washington/ DC, DC, US	JT	\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Rental Property Broadway, Sacramento, CA [RP] LOCATION: Sacramento, CA, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Rental Property P Street, Sacramento, CA [RP] LOCATION: Sacramento, CA, US	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
Rental Property U Street, Sacramento CA [RP] LOCATION: Sacramento/ Sacramento, CA, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Rental Property U Street, Sacramento, CA [RP] LOCATION: Sacramento, CA, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Rental Property V Street, Sacramento, CA [RP] LOCATION: Sacramento, CA, US	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Schwab Fixed Income Fund [MF]	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Schwab Checking [BA]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab Fundamental INL [EF] DESCRIPTION: Purchase on 11/9/23	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab Government Money Fund [MF]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Schwab International [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: Purchase on 3/24/23					
Schwab Muni Money Fund [BA]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab US Dividend [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab Value Advantage [MF]	JT	\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Purchase on 11/10/23					
Sector SPDR Financial [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: added to the position on 2/18/22					
Sector SPDR Industrial Select [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Sector SPDR Tech Select [EF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Purchased additional on 11/9/23					
SPDR Bloomberg Emerging MRKT [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: purchase					
SPDR S&P 500 ETF [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
TPMG Conservative [MF]	SP	\$250,001 - \$500,000	None		<input type="checkbox"/>
TPMG Mod- Account 2 [MF]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
TPMG Moderate Account 1 [MF]	SP	\$250,001 - \$500,000	None		<input type="checkbox"/>
VANGUARD CA INTERM-TERM TRE [MF]	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Purchased on 2/5/21 with a partial sale on 8/30/21					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Consumer Staples ETF (VDC) [EF] DESCRIPTION: Purchase on 10/23/24	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vanguard FTSE All World Ex US ETF (VEU) [EF] DESCRIPTION: Asset purchased 3/24/23	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard FTSEEuropean ETF (VGK) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard Health Care [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard High Yeild Corp [MF] DESCRIPTION: partial sale	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Walt Disney Company (DIS) [ST]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
WASATCH ULTRA GROWTH INS [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Wells Fargo Checking [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Savings [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<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?
Golden One Credit Union [BA] DESCRIPTION: Account Closed	JT	02/20/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
iShares MSCI Emerging Markets ex China ETF (EMXC) [EF]	JT	05/24/2024	P	\$15,001 - \$50,000	
Vanguard Consumer Staples ETF (VDC) [EF]	JT	10/23/2024	P	\$1,001 - \$15,000	
Vanguard FTSEEuropean ETF (VGK) [EF]	JT	05/24/2024	P	\$15,001 - \$50,000	
iShares Global Clean Energy ETF (ICLN) [EF]	JT	10/23/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares S&P 500 Growth ETF (IVW) [EF]	JT	10/23/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Real Estate Select Sector SPDR Fund (XLRE) [EF]	JT	05/24/2024	S (partial)	\$15,001 - \$50,000	<input checked="" 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

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Guild Mortgage	November 2008	Morgage, Elk Grove, CA	\$250,001 - \$500,000
JT	Bank of America	March 2008	Mortgage on Rental, Sacramento, CA	\$50,001 - \$100,000
JT	NewRez LLC	June 2008	Mortgage on Rental, Sacramento, CA	\$50,001 - \$100,000
JT	NewRez LLC	June 2006	Mortgage on Rental Property, Sac CA	\$50,001 - \$100,000
JT	Shellpoint Mortgage	November 2020	Mortgage on Rental Property, Washington DC	\$250,001 - \$500,000
JT	NewRez LLC	January 2013	Mortgage ,Washington DC	\$250,001 - \$500,000
JT	Freedom Mortgage	June 2011	Mortgage on Rental Property, Sac CA	\$100,001 - \$250,000
JT	Guild Mortgage	November 2009	Mortgage on Rental, Sacramento, CA	\$100,001 - \$250,000
JT	Wells Fargo Mortgage	April 2016	Rental Property, Sacramento CA	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Clinical Professor of Medicine	University of CA, Davis

CEO, President

Mango Management Inc

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?
Taipei Economic & Cultural Representative Office in the U.S.	01/21/2024	01/27/2024	Sacramento - Taipei - Sacramento	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
American Enterprise Institute	03/08/2024	03/11/2024	Washington, D.C. - Sea Island - Washington, D.C.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
U.S. Association of Former Members of Congress	03/23/2024	03/29/2024	Washington, D.C. - Seoul - Sacramento	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
United Nations Foundation	04/25/2024	04/30/2024	Washington, D.C. - Nausori - Tongatapu - Funafuti - Washington, D.C.	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Qatar Embassy in Washington, D.C.	05/09/2024	05/14/2024	Washington, D.C. - Doha - Washington, D.C.	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The Aspen Institute, Inc.	08/08/2024	08/18/2024	Sacramento - Dublin - Belfast - Sacramento	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
The Ripon Society & The Franklin Center	11/07/2024	11/12/2024	Sacramento - Vienna - Washington, D.C.	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.

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. Ami Bera , 08/06/2025