



Filing ID #10068013

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ron Estes  
**Status:** Member  
**State/District:** KS04

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 08/11/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
KPERS [DB]		Undetermined	Tax-Deferred		<input type="checkbox"/>
Spouse KPERS [DB]	SP	Undetermined	Tax-Deferred		<input type="checkbox"/>
Bank ⇒ Intrust checking and savings [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Bank ⇒ Mid American Credit Union [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Dependent Coverdale college savings ⇒ Putnam Large Cap Value Fund - A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Investment ⇒ US Treasury Savings Bonds [GS]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Kansas Learning Quest ⇒ Aggressive Track 20% Equity Portfolio [MF]		\$1 - \$1,000	Tax-Deferred		<input checked="" type="checkbox"/>
KPERS 457 ⇒ DFA US Large Cap Value 1 [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
KPERS 457 ⇒ Stable Value Fund - Great-West Life & Annuity Insurance Company [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
KPERS 457 ⇒ T Rowe Price Capital Appreciation [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
KPERS 457 ⇒ Vanguard Total Bond Market Index Inst [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ American Balanced Fund Cl F3 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ American Mutual Fund Cl F3 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Roth IRA ⇒ Capital World Growth and Income fund Cl F3 - American Funds [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Sold to rebalance account					
Roth IRA ⇒ Dodge & Cox Income Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ Invesco Corporate Bond Fund Cl R6 (ICBFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ Invesco Global Opportunities Cl R6 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ Investment Company of America - American Funds [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ JP Morgan Mid Cap Value Cl L [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ New Perspective Fund Cl F3 - American Funds [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Roth IRA ⇒ T. Rowe Price Integrated U.S. Small-Cap Growth Equity Fund - Class I (TQAIIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ U.S. Treasury Money Fund - I Class (TRGXX) [MF]		\$1 - \$1,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Roth IRA ⇒ Vanguard Total World Stock Index ETF (VT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse 401k - CUNA Mutual Holding Company ⇒ CUNA Mutual Lifestyle Aggressive [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse 401k - Stand Together Benefits, LLC 401K Plan ⇒ State Street Target Retire 2030 SL Cl IV [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Spouse 403b - Lincoln Investment ⇒ American Funds Washington Mutual Invstrs Fd - F1 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse 403b - Lincoln Investment ⇒ FederatedHermes Prime Cash Obl AS [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse 403b - Lincoln Investment ⇒ Goldman Sachs Intl Equity Insights Fund - A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse 403b - Lincoln Investment ⇒ GoldmanSachs Emerging Mkt Eq A [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Spouse 403b - Lincoln Investment ⇒ JPMorgan SmCap Equity A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse 403b - Lincoln Investment ⇒ Parnassus Mid Cap Fund - Inv [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse 403b - Lincoln Investment ⇒ PGIM High Yield Fund - A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse 403b - Lincoln Investment ⇒ PIMCO International Bond Fund - A [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Spouse 403b - Lincoln Investment ⇒ PRIMECAP Odyssey Growth Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse 403b - Lincoln Investment ⇒ PRIMECAP Odyssey Stock Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse Deferred Comp - MA ⇒ SMART Capital Preservation Fund [OT]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Deferred Comp					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Spouse Roth IRA - Putnam Investments ⇒ Putnam Intl Capital Opps - A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse Roth IRA - Putnam Investments ⇒ Putnam Large Cap Growth Class A (POGAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Spouse Roth IRA - Putnam Investments ⇒ Putnam Large Cap Value Fund A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input 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?
Roth IRA ⇒ Capital World Growth and Income Fund - Class F-3 (FWGIX) [MF]		11/27/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Sold to rebalance account					
Roth IRA ⇒ Capital World Growth and Income Fund - Class F-3 (FWGIX) [MF]		11/27/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: sold to rebalance account					
Roth IRA ⇒ New Perspective Fund - Class F-3 (FNPDFX) [MF]		11/27/2024	P	\$1,001 - \$15,000	
Roth IRA ⇒ U.S. Treasury Money Fund - I Class (TRGXX) [MF]		11/27/2024	P	\$1,001 - \$15,000	
Roth IRA ⇒ American Mutual Fund - Class F-3 (AFMFX) [MF]		11/26/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA ⇒ U.S. Treasury Money Fund - I Class (TRGXX) [MF]		11/26/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Kansas Learning Quest ⇒ Aggressive Track 20% Equity Portfolio (-) [OT]		02/08/2024	P	\$1,001 - \$15,000	
LOCATION: US					
DESCRIPTION: Mutual fund listing not found in database					
Kansas Learning Quest ⇒		05/13/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Aggressive Track 20% Equity Portfolio (-) [OT] LOCATION: US DESCRIPTION: Mutual fund listing not found in database				(partial)	
Roth IRA ⇒ Vanguard Total World Stock Index ETF (VT) [EF]		11/26/2024	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

Source	Type	Amount
State of Kansas	Spouse Salary	N/A
Kansas Public Employees Retirement System (KPERS)	Pension	\$10,260.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Member Mortgage Services	April 2020	Home mortgage	\$100,001 - \$250,000
	Citibank	December 2024	credit card balance	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
April 2017	State of Kansas and myself	Participation in the pension system and the 457 plan

## 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?
Aspen Institute	05/25/2024	06/01/2024	Wichita KS - Sydney Australia - Canberra Australia - Wichita Kansas	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ripon Society & Franklin Center	11/07/2024	11/12/2024	Wichita KS - Vienna Austria - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
The Economic Policy Innovation Center (EPIC)	04/12/2024	04/14/2024	Washington DC - Hot Springs, VA - Washington DC	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 INVESTMENT VEHICLE DETAILS

- KPERS 457
- Kansas Learning Quest  
LOCATION: KS
- Roth IRA
- Spouse 403b - Lincoln Investment (Owner: SP)
- Spouse Roth IRA - Putnam Investments (Owner: SP)
- Spouse 401k - CUNA Mutual Holding Company (Owner: SP)
- Spouse Deferred Comp - MA (Owner: SP)
- Dependent Coverdale college savings  
LOCATION: US
- Spouse 401k - Stand Together Benefits, LLC 401K Plan (Owner: SP)
- Investment  
LOCATION: US
- Bank  
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. Ron Estes , 08/11/2025