



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Vince Fong  
**Status:** Member  
**State/District:** CA20

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 08/13/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Boschma and Sons Dairy [OL]	SP	\$250,001 - \$500,000	Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Kern, CA, US DESCRIPTION: Spouse's equity and portion of income in family business.					
Capital One [BA]	SP	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
New York Life [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Residential Rental Property located in Bakersfield 93308 [RP]	SP	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Bakersfield, CA, US					
Residential Rental Property located in Bakersfield 93314 [RP]		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Bakersfield, CA, US					
Wells Fargo [BA]	SP	\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Enterprise Holdings 401(k) ⇒ LifePath Index 2050 Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity SEP-IRA ⇒ Fidelity Blue Chip Growth Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity SEP-IRA ⇒ Fidelity Zero Large Cap Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
ML Brokerage Account ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ML Brokerage Account ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ML Brokerage Account ⇒ Coca-Cola Company (KO) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ML Brokerage Account ⇒ Eaton Vance Tax-Advantaged Dividend Income Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ML Brokerage Account ⇒ Energy Select Sector SPDR Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ML Brokerage Account ⇒ Global X Robotics & AI [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ML Brokerage Account ⇒ Invesco Aerospace & Defense [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ML Brokerage Account ⇒ Invesco S&P 500 [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ML Brokerage Account ⇒ iShares Exponential Tech [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ML Brokerage Account ⇒ iShares Russell 1000 [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ML Brokerage Account ⇒ Kimberly-Clark Corporation (KMB) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ML Brokerage Account ⇒		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Lord Abbett Short Duration Income Fund Class C [MF]					<input type="checkbox"/>
ML Brokerage Account ⇒ Merrill Lynch Sweep Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
ML Brokerage Account ⇒ MFS Emerging Markets Debt Fund Class A [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ML Brokerage Account ⇒ Mondelez International, Inc. - Class A (MDLZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ML Brokerage Account ⇒ Oracle Corporation (ORCL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ML Brokerage Account ⇒ Pacer US Cash Cows 100 [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ML Brokerage Account ⇒ ProShares S&P 500 Dividend [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ML Brokerage Account ⇒ Touchstone Active Bond Fund Class A [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ML Brokerage Account ⇒ VanEck Rare Earth/Strategic Metals [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ML Brokerage Account ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ML Brokerage Account ⇒ WisdomTree Europe Hedged Equity Fund (HEDJ) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Progressive 401(k) ⇒ Vanguard Institutional Target Retirement 2050 Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Brokerage Account ⇒ Bank of America Corporation (BAC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Wells Fargo Brokerage Account ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Wells Fargo Brokerage Account ⇒ Citigroup, Inc. (C) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo Brokerage Account ⇒ Gilead Sciences, Inc. (GILD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Wells Fargo Brokerage Account ⇒ Kayne Anderson NextGen Energy & Infrastructure, Inc. (KMF) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Wells Fargo Brokerage Account ⇒ QUALCOMM Incorporated (QCOM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Wells Fargo Brokerage Account ⇒ Wells Fargo Bank Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ Allspring Special Small Cap Value Fund Class Institutional [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ American Funds EuroPacific Growth Fund Class F-2 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ American Funds New World Fund Class F-2 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ American Funds The Bond Fund Of America Class F-2 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ American Funds The Growth Fund of America Class F-2 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ American Funds Washington Mutual Investors Fund Class F-2 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ American High-Income Tr, Class F-2 Shs (AHIFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ Baron Small Cap Fund Institutional Class [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ Causeway International Value Fund - Institutional Class (CIVIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo Roth IRA ⇒ Dodge & Cox Stock Fund Class I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ Embark Commodity Strategy Fund Institutional Class (ECSWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ Invesco Developing Markets Fund Class Y [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ Jensen Quality Growth Fund Class I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ John Hancock Funds Disciplined Value Mid Cap Fund Class I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ PIMCO CommoditiesPLUS Strategy Fund Institutional Class [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ T Rowe Price Mid-Cap Growth Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo Roth IRA ⇒ T Rowe Price Overseas Stock Fund [MF]		\$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?
Boschma and Sons Dairy [OL]	SP	12/15/2024	S	Spouse/DC Over \$1,000,000	<input type="checkbox"/>
LOCATION: Kern, CA, US DESCRIPTION: Partnership interest in family dairy business.					

\* 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 California	Legislative Salary	\$58,745.04
Keller Williams	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	PHH Mortgage Services	December 2021	Mortgage for Bakersfield 93314 Rental Property	\$100,001 - \$250,000
SP	Wells Fargo	November 2009	Mortgage for Bakersfield 93308 Rental Property	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Jim Burke Education Foundation

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>Wells Fargo Roth IRA</li><li>Fidelity SEP-IRA (Owner: SP)</li><li>Enterprise Holdings 401(k) (Owner: SP)</li><li>Progressive 401(k) (Owner: SP)</li><li>ML Brokerage Account</li><li>Wells Fargo Brokerage Account</li></ul>
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## 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. Vince Fong , 08/13/2025