



Filing ID #10067055

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 07/17/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Residential property [RP]		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: La Habra, CA, US					
Wells Fargo Bank [BA]	JT	\$50,001 - \$100,000	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 ⇒ DFA Emerging Markets Core [MF]		\$50,001 - \$100,000	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 checked="" type="checkbox"/>
Charles Schwab IRA ⇒ DFA International Small [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab IRA ⇒ DFA International Value [MF]		None		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab IRA ⇒ DFA Intl Hi Relativ Profitability [MF]		\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab IRA ⇒ DFA Investment Grade [MF]		\$50,001 - \$100,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab IRA ⇒ DFA One-Year Fixed Income Pt. (DFIHX) [MF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab IRA ⇒ DFA Short-Duration Real [MF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab IRA ⇒ DFA Short-Term Extended Quality Ptf (DFEQX) [MF]		\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab IRA ⇒ DFA US Core Equity 2 [MF]		\$50,001 - \$100,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab IRA ⇒ DFA US Hi Relativ Profitability [MF]		\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
Charles Schwab IRA ⇒ DFA US Large Cap Value [MF]		None		Tax-Deferred	<input checked="" 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"/>
Charles Schwab IRA ⇒ Schwab Government Money Fund - Sweep Shares (SWGXX) [MF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" 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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab IRA ⇒ DFA International Value Portfolio (DFIVX) [MF]		08/26/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ International High Relative Profitability Portfolio Institutional Class (DIHRX) [MF]		08/26/2024	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ DFA Investment Grade Portfolio (DFAPX) [MF]		02/12/2024	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ DFA Investment Grade Portfolio (DFAPX) [MF]		07/02/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA Investment Grade Portfolio (DFAPX) [MF]		12/13/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvestment					
Charles Schwab IRA ⇒ DFA One-Year Fixed Income Pt. (DFIHX) [MF]		07/02/2024	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ DFA Short-Duration Real Return Portfolio Inst Cl (DFAIX) [MF]		07/02/2024	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ DFA Short-Term Extended Quality Ptf (DFEQX) [MF]		08/26/2024	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]		01/31/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]		06/12/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]		07/02/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ U.S. High Relative Profitability Portfolio Institutional Class (DURPX) [MF]		02/02/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒		08/26/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
U.S. High Relative Profitability Portfolio Institutional Class (DURPX) [MF]					
Charles Schwab IRA ⇒ DFA U.S. Large Cap Value Portfolio (DFLVX) [MF]		08/26/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab IRA ⇒ Schwab Government Money Fund - Sweep Shares (SWGXX) [MF]		02/01/2024	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ Schwab Government Money Fund - Sweep Shares (SWGXX) [MF]		06/13/2024	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ Schwab Government Money Fund - Sweep Shares (SWGXX) [MF]		08/27/2024	P	\$1,001 - \$15,000	
Charles Schwab IRA ⇒ International Core Equity 2 Portfolio (DFIEX) [MF]		06/27/2024	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvestment					
Charles Schwab IRA ⇒ International Core Equity 2 Portfolio (DFIEX) [MF]		08/26/2024	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

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**

None disclosed.

## **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 , 07/17/2025