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GPO Member Guide)

## Rep. Jim Costa (D-CA)

House · Democrat (most recent term) · CA-21 · in Congress 2005–present ·  
Bioguide ID C001059

**Party history:** D 2005–present. Source: term data in unitedstates/congress-legislators (CC0);  
party shown is as recorded per term there.

### Estimated net worth (from public disclosures)

| Estimate                                                                                                    | Report year   | Low              | Mid                | High             |
|-------------------------------------------------------------------------------------------------------------|---------------|------------------|--------------------|------------------|
| (a) Estimated net worth at the earliest available report (2013); the member entered office earlier, in 2005 | 2013          | \$1,194,029      | <b>\$4,077,014</b> | \$6,959,998      |
| (b) Latest net worth estimate                                                                               | 2025          | \$617,026        | <b>\$3,561,012</b> | \$6,504,997      |
| (c) Estimated gain / loss, nominal dollars, 2013 → 2025 (12 years spanned)                                  | 2013–<br>2025 | –<br>\$6,342,972 | <b>–\$516,002</b>  | +<br>\$5,310,968 |

Gain Low = latest Low – earliest High; Gain High = latest High – earliest Low (widest possible spread); Mid = latest Mid – earliest Mid.

**Reliability flags (net worth):** none for these two endpoints. **Included in the recommended dollar-gain ranking.**

**Net worth by report year** (mid; Low–High)

| Report year | Assets (mid) | Liabilities (mid) | Net worth mid      | Low ... High                | Status / flags |
|-------------|--------------|-------------------|--------------------|-----------------------------|----------------|
| 2013        | \$4,627,014  | \$550,001         | <b>\$4,077,014</b> | \$1,194,029 ... \$6,959,998 | computed       |
| 2014        | \$5,092,515  | \$375,000         | <b>\$4,717,514</b> | \$1,749,030 ... \$7,685,999 | computed       |
| 2015        | \$5,067,514  | \$375,000         | <b>\$4,692,514</b> | \$1,735,029 ... \$7,649,999 | computed       |
| 2016        | \$5,212,014  | \$375,000         | <b>\$4,837,014</b> | \$1,853,029 ... \$7,820,999 | computed       |
| 2017        | \$5,317,514  | \$750,001         | <b>\$4,567,514</b> | \$1,410,029 ... \$7,724,998 | computed       |

|      |             |             |                    |                                |          |
|------|-------------|-------------|--------------------|--------------------------------|----------|
| 2018 | \$5,277,514 | \$750,001   | <b>\$4,527,513</b> | \$1,394,028 ...<br>\$7,660,998 | computed |
| 2019 | \$5,549,012 | \$925,002   | <b>\$4,624,011</b> | \$1,353,025 ...<br>\$7,894,997 | computed |
| 2020 | \$5,311,512 | \$1,500,002 | <b>\$3,811,510</b> | \$478,023 ... \$7,144,996      | computed |
| 2021 | \$5,502,513 | \$1,500,002 | <b>\$4,002,511</b> | \$580,026 ...<br>\$7,424,996   | computed |
| 2022 | \$5,216,512 | \$1,125,002 | <b>\$4,091,510</b> | \$888,024 ... \$7,294,997      | computed |
| 2023 | \$5,407,012 | \$1,125,002 | <b>\$4,282,010</b> | \$1,004,023 ...<br>\$7,559,997 | computed |
| 2024 | \$4,445,512 | \$1,125,002 | <b>\$3,320,510</b> | \$351,024 ... \$6,289,997      | computed |
| 2025 | \$4,486,013 | \$925,002   | <b>\$3,561,012</b> | \$617,026 ... \$6,504,997      | computed |

- **What this is:** Net worth = Schedule A assets (each value range at its midpoint; low–high range shown) minus Schedule D liabilities (midpoints / ranges). **Low** = assets at range floors minus liabilities at range ceilings; **Mid** = midpoints; **High** = assets at ceilings minus liabilities at floors. Low and High are outer bounds of the reported ranges, not likely outcomes.
- **What it excludes / understates:** exact values (only ranges are reported); a **personal residence is not reported as an asset** (although a mortgage on it may be listed as a liability, which then lowers the estimate); retirement and federal accounts (e.g. Thrift Savings Plan, defined-benefit pensions) are only partly or not reported; assets of excepted/blind trusts, cash held below reporting thresholds, vehicles, household goods and most spouse/dependent items exempt from reporting are not included; liabilities on a personal residence, revolving credit under thresholds and loans to family may be omitted by filers.
- **Open-ended top ranges** (e.g. "Over \$50,000,000") are counted at their **lower bound** and flagged, so such values are understated.
- The change is a change in **estimated net worth in nominal dollars** (no inflation adjustment). It includes salary, gifts, inheritances, business income and re-valuation as well as investment results, and it is subject to range-bracket noise; it is **not** an investment return and implies nothing about conduct.

**Read this first.** Members report asset values only as *ranges* (e.g. "\$15,001 – \$50,000"), never exact dollars. Every figure below is an **estimate** computed from range midpoints, not a measured return. Figures cannot be interpreted as investment performance, and they do not show wrongdoing or skill. Methodology and limitations are at the end and in the project README. Sources: public financial disclosure reports filed with the Clerk of the U.S. House of Representatives and/or the Secretary of the Senate (Senate eFD), linked below.

AVG. ANNUAL  
CHANGE  
(GEOMETRIC, EST.)  
**+11.4%**

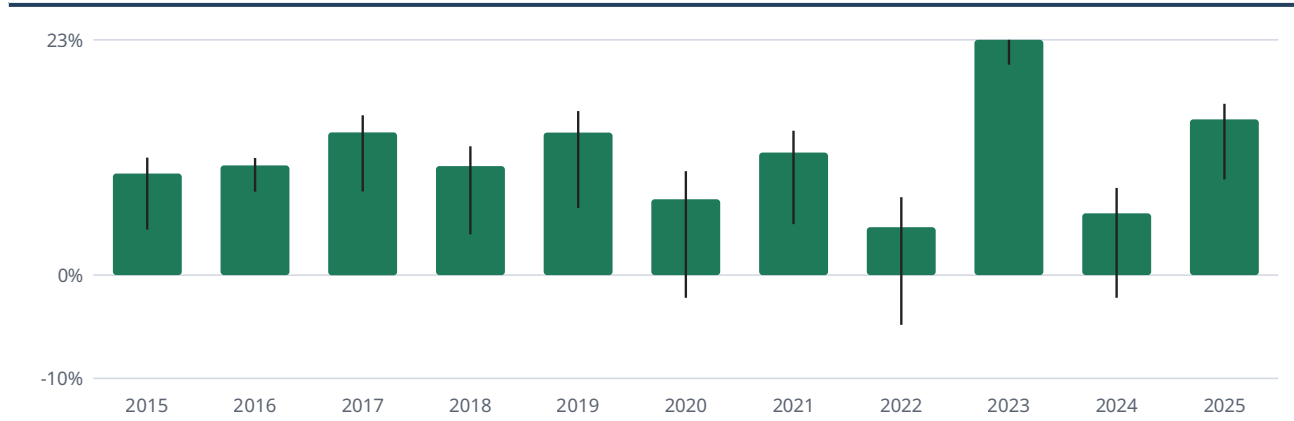
SIMPLE AVERAGE OF  
YEARS  
**+11.5%**

YEARS ESTIMATED  
**11**

BEST / WORST  
SINGLE YEAR  
**2023 +23%**  
**2022 +5%**

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +4.9% to +13.3%. This band is narrow because it moves both years together; the true uncertainty is larger — see the per-year “strict envelope” column and the limitations.

## Estimated year-over-year change



Bars: midpoint estimate; whisker: same-position floor/ceiling band. Axis clipped to -100%...+150%. Years with insufficient traceable holdings are omitted.

| Year (t-1 → t) | Opening value (mid) | Closing value (mid) | Income (mid) | Buy (mid) | Sales (mid) | Est. gain | Same-position band | Strict envelope | Traced coverage | Status flags                                      |
|----------------|---------------------|---------------------|--------------|-----------|-------------|-----------|--------------------|-----------------|-----------------|---------------------------------------------------|
| 2013→2014      | \$1,578,512         | \$1,636,012         | \$45,053     | \$0       | \$8,000     | +7.0%     | +6.7% ... +7.1%    | -79% ... +93%   | 34%             | excluded; not eligible; traced coverage 34% < 60% |
| 2014→2015      | \$4,979,012         | \$4,994,513         | \$595,054    | \$257,512 | \$137,006   | +9.8%     | +4.4% ... +11.4%   | -117% ... +137% | 98%             | counted; many new/exited positions                |
| 2015→2016      | \$5,051,514         | \$5,131,012         | \$593,803    | \$282,012 | \$145,504   | +10.6%    | +8.1% ... +11.3%   | -116% ... +137% | 100%            | counted                                           |
| 2016→2017      | \$5,104,514         | \$5,210,014         | \$583,903    | \$137,504 | \$154,004   | +13.8%    | +8.1% ... +15.5%   | -110% ... +138% | 98%             | counted                                           |
| 2017→2018      | \$5,242,514         | \$5,170,013         | \$593,904    | \$0       | \$32,002    | +10.6%    | +4.0% ... +12.5%   | -108% ... +129% | 99%             | counted                                           |

|           |             |             |           |           |           |        |                         |                    |      |        |
|-----------|-------------|-------------|-----------|-----------|-----------|--------|-------------------------|--------------------|------|--------|
| 2018→2019 | \$4,581,004 | \$4,664,005 | \$616,404 | \$83,001  | \$16,001  | +13.8% | +6.5%<br>...<br>+15.9%  | -110% ...<br>+137% | 87%  | counte |
| 2019→2020 | \$4,581,004 | \$4,356,004 | \$593,904 | \$32,500  | \$0       | +7.3%  | -2.2%<br>...<br>+10.1%  | -113% ...<br>+128% | 83%  | counte |
| 2020→2021 | \$5,279,011 | \$5,312,011 | \$593,904 | \$0       | \$0       | +11.9% | +4.9%<br>...<br>+14.0%  | -104% ...<br>+128% | 99%  | counte |
| 2021→2022 | \$5,470,012 | \$5,184,012 | \$593,303 | \$207,501 | \$154,004 | +4.6%  | -4.8%<br>...<br>+7.5%   | -112% ...<br>+121% | 99%  | counte |
| 2022→2023 | \$4,248,504 | \$4,623,504 | \$593,202 | \$0       | \$0       | +22.8% | +20.4%<br>...<br>+23.4% | -106% ...<br>+151% | 81%  | counte |
| 2023→2024 | \$5,407,012 | \$4,413,012 | \$583,202 | \$16,001  | \$750,000 | +6.0%  | -2.2%<br>...<br>+8.4%   | -109% ...<br>+121% | 100% | counte |
| 2024→2025 | \$4,305,510 | \$4,421,012 | \$582,602 | \$177,506 | \$129,005 | +15.1% | +9.3%<br>...<br>+16.6%  | -120% ...<br>+150% | 97%  | counte |

## Filings used

Each annual-report year uses one filing (most recently filed version among originals/amendments whose Schedule A row count is  $\geq 40\%$  of the largest). Electronic (text) PDFs are parsed. Scanned/image-only filings are OCR-read and used **only** if they pass the explicit validation gates described in the project README (value/income coverage, two-engine agreement, exact bracket snapping, page completeness, year-to-year position continuity); such years are labelled **OCR-derived** below. Scanned filings that fail validation are listed as “insufficient data – scanned”.

| Report year | Doc ID   | Type            | Filed     | Schedule A rows | Rows with unparsed value | Source (official filing) / SHA-256                                                                       |
|-------------|----------|-----------------|-----------|-----------------|--------------------------|----------------------------------------------------------------------------------------------------------|
| 2013        | 10005034 | House amendment | 3/13/2015 | 29              | 0                        | <a href="#">10005034.pdf</a><br>6d905f54688b9f23b2b333916b2ab96baf1eadeaa516f6dac<br>a6261eebfe5dd6e     |
| 2014        | 10005881 | House annual    | 5/15/2015 | 31              | 0                        | <a href="#">10005881.pdf</a><br>1fa241156bbc535e5d434f425<br>13fa3d5cef9729f8fa0542d6<br>d5ee50308054b97 |

|      |          |              |           |    |   |                                                                                                          |
|------|----------|--------------|-----------|----|---|----------------------------------------------------------------------------------------------------------|
| 2015 | 10010810 | House annual | 5/16/2016 | 37 | 0 | <a href="#">10010810.pdf</a><br>b850b8742b6c15bc49a624570<br>9a22bfdc88fbe1912a879c1f8<br>a6396a7faa6f54 |
| 2016 | 10016268 | House annual | 5/15/2017 | 33 | 0 | <a href="#">10016268.pdf</a><br>59f73028fc2a186adbd40eba<br>a0e05564c444eceda74f01d34<br>5059b82807a7819 |
| 2017 | 10022064 | House annual | 5/15/2018 | 32 | 0 | <a href="#">10022064.pdf</a><br>1f9dc6c08278e97a250e5771<br>bb93bc7e07818199750911404<br>c15324ece91aaed |
| 2018 | 10026885 | House annual | 5/15/2019 | 30 | 0 | <a href="#">10026885.pdf</a><br>b6031d146c7694bf7efce7bc5<br>e0c3a0dc7bb7b5e558576e6c<br>b7b09d69022ab21 |
| 2019 | 10037960 | House annual | 8/13/2020 | 31 | 0 | <a href="#">10037960.pdf</a><br>aaa3d28592278b88cd7626be9<br>6bcb7e49915f829ca0079cfd7<br>8046c7ae0b1c29 |
| 2020 | 10043002 | House annual | 8/13/2021 | 27 | 0 | <a href="#">10043002.pdf</a><br>7e62344c905e153cb6baa6ec<br>dbf98f0e205990c6cbf396074<br>b22790468f03925 |
| 2021 | 10047207 | House annual | 8/12/2022 | 27 | 0 | <a href="#">10047207.pdf</a><br>ee93510ff9924628e1f982082<br>eab36d55ac4fa926a3e1bd61<br>bab740ed6515d05 |
| 2022 | 10053873 | House annual | 8/11/2023 | 28 | 0 | <a href="#">10053873.pdf</a><br>dc05fdcc4dd274cb81f704da<br>b441965193037622b25955cb2<br>2e38e425633e694 |
| 2023 | 10060909 | House annual | 8/9/2024  | 24 | 0 | <a href="#">10060909.pdf</a><br>7a15b82b216ec544d851530f4<br>707b407e6fd9c32f6b979430<br>dc6a49eeebaf07  |
| 2024 | 10067734 | House annual | 8/12/2025 | 26 | 0 | <a href="#">10067734.pdf</a><br>0b36ddd23d4e8e707cb76b456<br>ac7e1d6a1b5bf97ad49b2326<br>c6cb1fb61d5433d |
| 2025 | 10077120 | House annual | 8/13/2026 | 28 | 0 | <a href="#">10077120.pdf</a><br>6f521a1a96999e7bdf60ff71<br>c976f0d9de46bb39a6ba35fc3<br>6f0191c9e391347 |

## Largest movers 2022→2023

| Position (as written in filing)                 | Owner | Kind | Opening range(s)                                  | Closing range(s)                                    | Buys (mid) | Sales (mid) |
|-------------------------------------------------|-------|------|---------------------------------------------------|-----------------------------------------------------|------------|-------------|
| Rental Home [RP]                                | —     | held | \$250,001 - \$500,000;<br>\$500,001 - \$1,000,000 | \$500,001 - \$1,000,000;<br>\$500,001 - \$1,000,000 | \$0        | \$0         |
| James M. Costa Farms (Sole Proprietorship) [FA] | —     | held | \$1,000,001 - \$5,000,000                         | \$1,000,001 - \$5,000,000                           | \$0        | \$0         |
| Heartland Financial USA, Inc. (HTLF) [ST]       | —     | held | \$15,001 - \$50,000                               | \$15,001 - \$50,000                                 | \$0        | \$0         |
| Portuguese Fraternal Society of America [WU]    | —     | held | \$1,001 - \$15,000                                | \$1,001 - \$15,000                                  | \$0        | \$0         |
| United Security Bank [BA]                       | —     | held | \$50,001 - \$100,000                              | \$50,001 - \$100,000                                | \$0        | \$0         |
| Bank of America [BA]                            | —     | held | \$1,001 - \$15,000                                | \$1,001 - \$15,000                                  | \$0        | \$0         |

## Largest movers 2023→2024

| Position (as written in filing)                                                     | Owner | Kind | Opening range(s)          | Closing range(s)          | Buys (mid) | Sales (mid) |
|-------------------------------------------------------------------------------------|-------|------|---------------------------|---------------------------|------------|-------------|
| Wells Fargo Advisors 401(k) ⇒ Mainstay Winslow Large CAP Growth Fund [MF]           | —     | held | \$100,001 - \$250,000     | \$50,001 - \$100,000      | \$0        | \$0         |
| Wells Fargo Advisors 401(k) ⇒ T Rowe Price Overseas Stock Fund [MF]                 | —     | held | \$50,001 - \$100,000      | \$15,001 - \$50,000       | \$0        | \$0         |
| Wells Fargo Advisors 401(k) ⇒ Virtus Ceredex Mid-Cap Value Equity Fund Class I [MF] | —     | held | \$50,001 - \$100,000      | \$15,001 - \$50,000       | \$0        | \$0         |
| Wells Fargo Advisors 401(k) ⇒ Baird Aggregate Bond Fund Class Institutional [MF]    | —     | held | \$50,001 - \$100,000      | \$15,001 - \$50,000       | \$0        | \$0         |
| Wells Fargo Advisors 401(k) ⇒ Pimco Commodity Real Return [MF]                      | —     | held | \$15,001 - \$50,000       | None                      | \$0        | \$0         |
| James M. Costa Farms (Sole Proprietorship) [FA]                                     | —     | held | \$1,000,001 - \$5,000,000 | \$1,000,001 - \$5,000,000 | \$0        | \$0         |
| Wells Fargo Advisors 401(k) ⇒ Invesco Developing Markets Fund [MF]                  | —     | held | \$15,001 - \$50,000       | \$15,001 - \$50,000       | \$0        | \$0         |
| Wells Fargo Advisors 401(k) ⇒ MFS SER TR 1 VALUE FD [MF]                            | —     | held | \$50,001 - \$100,000      | \$50,001 - \$100,000      | \$0        | \$0         |

## Largest movers 2024→2025

| Position (as written in filing)                                                             | Owner | Kind | Opening range(s)     | Closing range(s)     | Buys (mid) | Sales (mid) |
|---------------------------------------------------------------------------------------------|-------|------|----------------------|----------------------|------------|-------------|
| Wells Fargo Advisors 401(k) ⇒ NYLI Winslow Large Cap Growth Fund Class I (MLAIX) [MF]       | —     | new  | —                    | \$50,001 - \$100,000 | \$8,000    | \$8,000     |
| United Security Bank [BA]                                                                   | —     | held | \$50,001 - \$100,000 | \$1,001 - \$15,000   | \$0        | \$0         |
| Wells Fargo Advisors 401(k) ⇒ T Rowe Price Overseas Stock Fund [MF]                         | —     | held | \$15,001 - \$50,000  | \$50,001 - \$100,000 | \$8,000    | \$8,000     |
| Wells Fargo Advisors 401(k) ⇒ Embark Commodity Strategy Fund Institutional Class (ECSWX) [  | —     | new  | —                    | \$15,001 - \$50,000  | \$8,000    | \$0         |
| Wells Fargo Advisors 401(k) ⇒ Goldman Sachs FS Treasury Instruments Fund [MF]               | —     | held | \$1,001 - \$15,000   | \$1,001 - \$15,000   | \$8,000    | \$24,002    |
| Wells Fargo Advisors 401(k) ⇒ EuroPacific Growth Fund, Class F-2 Shs (AEPFX) [MF]           | —     | held | \$1,001 - \$15,000   | \$1,001 - \$15,000   | \$8,000    | \$0         |
| Wells Fargo Advisors 401(k) ⇒ MFS SER TR 1 VALUE FD [MF]                                    | —     | held | \$50,001 - \$100,000 | \$50,001 - \$100,000 | \$8,000    | \$0         |
| Wells Fargo Advisors 401(k) ⇒ Allspring Special Mid Cap Value Fund Insti Class (WFMIX) [MF] | —     | new  | —                    | \$15,001 - \$50,000  | \$40,501   | \$0         |

## Method (summary)

1. Schedule A asset rows are read from each annual report; the dollar range for each row is converted to its midpoint. Open-ended top ranges ("Over \$50,000,000") are excluded from the traced set and counted as a coverage loss.
2. Positions are matched year to year by owner code (self/SP/DC/JT) + normalised asset name. A position that appears only in year t is included only if Schedule B shows a purchase of it in year t (opening value 0); a position that disappears is included only if Schedule B shows a sale (closing value 0). Otherwise it is excluded as unexplained.
3. Estimated gain = (closing – opening + reported income – purchases + sale proceeds) ÷ opening, all at midpoints, for the traced positions. "Capital gains" income is not added again (it is already in value change and sale proceeds).
4. A year counts only if traced opening value ≥ \$50,000 and traced coverage ≥ 60% of the opening midpoint. A member is ranked only with ≥ 3 such years (exactly 2 = "limited data", shown but unranked). Average = geometric mean of (1+yearly estimate).

## Limitations

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- Ranges are wide (up to a factor of 5 or more, and up to \$50M+ open-ended); a holding can move between ranges without any real change in value, and stay in a range while moving materially. Yearly estimates are therefore noisy; the “strict envelope” shows the mathematical worst/best case and is typically wider than  $\pm 100\%$ .
- Purchases and sales are only disclosed as ranges and only for transactions over \$1,000; partial sales, dividend reinvestment, spousal/dependent accounts and retirement-plan funds are reported inconsistently. Excepted/ blind trusts, personal residences and certain pensions are not reported at all.
- Filers sometimes change how they list assets (e.g. listing a brokerage account vs. its individual holdings), which can make positions untraceable across years; these are excluded rather than guessed.
- Asset values in an annual report are as of Dec 31 of the reporting year; the report year  $t-1 \rightarrow t$  covers that calendar year. Late or amended filings are used when filed; extensions can delay them.
- The text of these reports is machine-parsed from PDFs; parse errors are possible. Every number links back to the cited filing. This is not investment advice.
- Use of these filings is restricted by 5 U.S.C. § 105(c) (no unlawful, commercial or credit-rating purpose, and none for solicitation of money).

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Figures are estimates derived from value ranges reported in public financial disclosures; they are not exact values and are not financial advice.