

United States Senate

Financial Disclosures

Candidate Report

Mr. Daniel L Osborn

State of Candidacy: NE | Candidacy Commenced: 07/08/2025

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The following statements were checked before filing:

- ☒ I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- ☒ I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.

☐ I *omitted* assets because they meet the three-part test for exemption.

Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance? **Yes**

#	Date	Activity	Amount	Who Paid?	Who received payment?	Comments
1	05/07/2025	Speech	\$2,000.00	Williams College Williamstown, MA	Self	n/a
2	09/09/2025	Speech	\$2,722.00	Simpson College Indianola, IA	Self	n/a

Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Self	Wages	B & K Mechanical Contractors Omaha, NE	\$108,089.91	n/a
2	Spouse	Salary	Osborn for Senate Omaha, NE	> \$1,000	n/a
3	Spouse	Salary	Ref's Sports Bar & Grille, Sugar Creek Omaha, NE	> \$1,000	n/a
4	Spouse	Other (Consulting Fees)	Independent Campaigns LLC Sheridan, WY	> \$1,000	n/a
5	Spouse	Other (Consulting Fees)	Dark Forest, LLC Omaha, NE	> \$1,000	n/a
6	Self	Other (Consulting Fees)	Working Class Heroes Fund Omaha, NE	\$10,000.00	n/a
7	Spouse	Salary	SCBC CSV, LLC Omaha, NE	> \$1,000	n/a
8	Self	Salary	Osborn for Senate Omaha, NE	\$48,014.40	n/a

Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

	Asset	Asset Type	Owner	Value	Income Type	Income
1	Kellogg Midwest Federal Credit Union (Omaha, NE) <i>Type: Checking, Savings</i> <i>Filer comment: Reported as spouse asset on prior report</i>	Bank Deposit	Joint	\$1,001 - \$15,000	None	None (or less than \$201)
2	FNBO (Omaha, NE) <i>Type: Checking, Savings</i>	Bank Deposit	Self	\$1,001 - \$15,000	None	None (or less than \$201)
3	VOO - S&P 500 ETF Vanguard	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
4	AGG - US Aggregate Bond Ishares Core ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None	None (or less than \$201)
5	Independent Campaigns LLC <i>Company: Independent Campaigns LLC (Sheridan, WY) Description: Consulting Firm Filer comment: Value reflects spouse's 1/3 ownership interest; entity has dissolved.</i>	Business Entity Limited Liability Company (LLC)	Spouse	None (or less than \$1,001)	None	None (or less than \$201)
6	Kellogg USA LLC - Pension	Retirement Plans Defined Benefit Pension Plan	Self	Unascertainable	None	None (or less than \$201)
7	Kellogg USA LLC Fidelity NetBenefits Retirement Savings Account	Retirement Plans 401(k), 403(b), or other Defined Contribution Plan.	Self	--		

	Asset	Asset Type	Owner	Value	Income Type	Income
7.1	International Equity	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Excepted Investment Fund	None (or less than \$201)
7.2	International Eq Index	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
7.3	Small-Mid Co Value	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Excepted Investment Fund	None (or less than \$201)
7.4	Small-Mid Co Growth	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Excepted Investment Fund	None (or less than \$201)
7.5	Large Company Value	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund	None (or less than \$201)
7.6	US Large Co Equity Index	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund	None (or less than \$201)
7.7	2040 Target Retirement	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Excepted Investment Fund	None (or less than \$201)
8	NEST Advisor College Savings Plan <i>Institution:</i> NEST Advisor <i>Filer comment:</i> Reported as dependent child asset on prior report	Education Savings Plans 529 College Savings Plan	Spouse	--		
8.1	Growth Static A	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)

Part 4a. Periodic Transaction Report Summary

Part 4b. Transactions**Not required****Part 5. Gifts****Not required****Part 6. Travel****Not required****Part 7. Liabilities**

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2021	Child	Educational Loan	-	9.375% (on demand)	\$15,001 - \$50,000	Sallie Mae Philadelphia, PA	Omitted from prior disclosure because child was not a dependent in CY 2024.

Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **Yes**

#	Position Dates	Position Held	Entity	Entity Type	Comments
1	Nov 2024 to Apr 2026	Employee	B & K Mechanical Contractors LLC Omaha, NE	Corporation	Employed May 2023-May 2024 and then resumed employment in Nov 2024.

Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **Yes**

#	Date	Parties Involved	Type	Status and Terms	Comments
1	Apr 2023	Kellogg USA LLC Omaha, NE	Continuing participation in an employee benefit plan	Defined benefit pension plan that provides service retirement benefits.	n/a
2	Apr 2023	Kellogg USA LLC Fidelity NetBenefits Retirement Savings Account Omaha, NE	Continuing participation in an employee benefit plan	Defined contribution plan that provides service retirement benefits.	n/a

Part 10. Compensation

Only required if you are a candidate or this is your first report: Did any person or entity pay more than \$5,000 to you or for services provided by you? **Yes**

#	Source	Duties	Comments
1	B & K Mechanical Contractors Omaha, NE	Unionized steamfitter and contributed to the company's sales.	n/a
2	Osborn for Senate Omaha, NE	Campaign-related services	n/a
3	Working Class Heroes Fund Omaha, NE	January 2025 payment for political consulting.	n/a
4	Osborn for Senate 2024 Omaha, NE	Campaigned for the United States Senate in Nebraska for the 2024 election cycle.	n/a

Attachments & Comments

No attachments added.

No comments added.

