Filing ID #10047894

Financial Disclosure Report

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Filer Information

Name: Hon. Jerry Lee Carl Jr.
Status: Member
State/District: AL01

Filing Information

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 05/12/2022

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Advance LLC [OL] Location: Mobile, AL, US Description: Advance LLC-Commercial Real Estate		$1,000,001 - $5,000,000	Rent	$15,001 - $50,000	
Ascensus 401k ⇒ Goldman Sachs Balanced Strat C [MF]	SP	$100,001 - $250,000	Capital Gains, Dividends, Interest	$15,001 - $50,000	
Ascensus 401k ⇒ Goldman Sachs Growth & Inc Strat C [MF]		$250,001 - $500,000	Capital Gains, Dividends, Interest	$15,001 - $50,000	
Ascensus 401k ⇒ Goldman Sachs Growth Strat C [MF]		$250,001 - $500,000	Capital Gains, Dividends, Interest	$15,001 - $50,000	
Ascensus 401k ⇒ Goldman Sachs Growth Strat C [MF]	SP	$250,001 - $500,000	Capital Gains, Dividends, Interest	$15,001 - $50,000	
AXA Life Insurance ⇒ AXA Large Cap Growth Managed Volatility [MF]		$50,001 - $100,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	
AXA Life Insurance ⇒ AXA Moderate Allocation [MF]		$1,001 - $15,000	Capital Gains, Dividends, Interest	$1,001 - $2,500	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
AXA Life Insurance ⇒ AXA/AB Small Cap Growth [MF]		$50,001 - $100,000	Capital Gains, Dividends, Interest	$15,001 - $50,000	☐
AXA Life Insurance ⇒ EQ/BlackRock Basic Value Equity [MF]		$15,001 - $50,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	☐
Butterfly & Cricket LLC [OL] LOCATION: Mobile, AL, US DESCRIPTION: Butterfly & Cricket LLC-Timber Land	JT	$500,001 - $1,000,000	Partnership Income	None	☐
Community Bank [BA]	SP	$15,001 - $50,000	Interest	$201 - $1,000	☐
ECM Home Health Services Inc. [OL] LOCATION: Mobile, AL, US DESCRIPTION: ECM Home Health Services	SP	$500,001 - $1,000,000	S Corporation Income	$15,001 - $50,000	☐
PNC Bank Accounts [BA]	JT	$100,001 - $250,000	Interest	$201 - $1,000	☐
Prudential Annuity ⇒ AST Capital Growth Asset [MF]		$250,001 - $500,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	☐
Prudential Annuity ⇒ AST Capital Growth Asset [MF]	SP	$250,001 - $500,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	☐
Prudential Annuity ⇒ AST Capital Growth Asset [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends, Interest	$201 - $1,000	☐
River Oaks Landing LLC [OL] LOCATION: Mobile, AL, US DESCRIPTION: River Oaks Landing-Bed and Breakfast		$1,000,001 - $5,000,000	Rent	None	☐
RSA Alabama [DB]		$15,001 - $50,000	Capital Gains, Dividends, Interest	$1,001 - $2,500	☐
Trustmark Bank [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	☐

* Asset class 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

None disclosed.

Schedule C: Earned Income

Source	Type	Amount
ECM Home Health Services	Spose Salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Hancock Whitney	March 2019	Line of Credit	$100,001 - $250,000

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 Asset Class Details

- Ascensus 401k
- Ascensus 401k (Owner: SP)
- AXA Life Insurance
- Prudential Annuity
- Prudential Annuity (Owner: SP)

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. Jerry Lee Carl Jr., 05/12/2022