



# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Julia Letlow  
**Status:** Congressional Candidate  
**State/District:** LA05

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2021  
**Filing Date:** 01/13/2026  
**Period Covered:** 01/01/2020– 01/19/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America Checking [BA]		\$1,001 - \$15,000	None		
Louisiana State Employees Retirement [DB]		\$15,001 - \$50,000	None		
Merrill Lynch 529 Account #536 - Child 2 ⇒ Blackrock Global Allocation PRT C [5F]		\$1,001 - \$15,000	Tax-Deferred		
LOCATION: LA					
Merrill Lynch 529 Account #536 - Child 2 ⇒ Frnk Temp Mutual Shares C [5F]		\$1,001 - \$15,000	Tax-Deferred		
LOCATION: LA					
Merrill Lynch 529 Account #536 - Child 2 ⇒ Ishares Core Mod Allocation C [5F]		\$1,001 - \$15,000	Tax-Deferred		
LOCATION: LA					
Merrill Lynch 529 Account #536 - Child 2 ⇒ Nextgen Savings Port C [5F]		\$1,001 - \$15,000	Tax-Deferred		
LOCATION: LA					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Merrill Lynch Brokerage Account ⇒ Bank of America, NA RASP [BA]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ BlackRock Eq Dividend I (MADVX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ ClearBridge Large Cap Growth Fd Class I (SBLYX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ Edgewood Growth Fund Insti (EGFIX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ iShares Broad USD High Yield Corporate Bond ETF (USHY) [EF]	SP	\$1 - \$1,000	None		
Merrill Lynch Brokerage Account ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ iShares Russell 1000 Growth Fund (IWF) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ iShares U.S. Treasury Bond ETF (GOVT) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ Macquarie Small Cap Core Fund Institutional (DCCIX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ MFS Value Fund - Class I (MEIIX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ Oakmark International Fund Institutional Class (OANIX)	SP	\$1,001 - \$15,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
[MF]					
Merrill Lynch Brokerage Account ⇒ PIMCO Investment Grade Credit Bond Fund Class I-2 (PBDPX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ State Street SPDR Bloomberg 1-3 Month T-Bill ETF (BIL) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ TCW Total Return Bond Fund Cl I (TGLMX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ Vanguard Mortgage-Backed Securities ETF (VMBS) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Brokerage Account ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch Cash Managed Account #948 ⇒ Bank of America, NA [BA]		\$1,001 - \$15,000	None		
Merrill Lynch Roth IRA #324 ⇒ BlackRock Emerging Markets Fund Class I (MADCX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒ BlackRock Advantage Global Fund, Inc. - Institutional (MAGCX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒ BlackRock Capital Appreciation Fund Inc. Institutional (MAFGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒ BlackRock Eq Dividend I (MADVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒ BlackRock Global Alloc I (MALOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BlackRock High Yield Portfolio - Institutional (BHYIX) [MF]					
Merrill Lynch Roth IRA #324 ⇒ BlackRock International I (MAILX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒ BlackRock Large Cap Focus Growth Fund, Inc. - Institutional (MAFOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒ BlackRock Large Cap Focus Value Fund, Inc - Institutional (MABAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒ BlackRock Total Return Fund Class I (MAHQX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒ Pfizer, Inc. (PFE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA #324 ⇒ Plains All American Pipeline, L.P. - Common Units representing Limited Partner Interests (PAA) [ST]		\$1,001 - \$15,000	Tax-Deferred		

\* 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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
US House of Representatives	Spousal Salary	\$35,806.00	\$159,660.00

University of Louisiana at Monroe	Salary	\$89,333.00	\$88,697.00
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## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo	2018	Auto Loan	\$15,001 - \$50,000
	Home Point Financial Mortgage	March 2020	Home Mortgage	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2008	Filer and LA State Retirement System	Filer worked for University of Louisiana at Monroe and participated in the retirement system

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"> <li>o Merrill Lynch Roth IRA #324</li> <li>o Merrill Lynch Cash Managed Account #948 LOCATION: US</li> <li>o Merrill Lynch 529 Account #536 - Child 2 LOCATION: LA</li> <li>o Merrill Lynch Brokerage Account (Owner: SP)</li> </ul>
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## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**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. Julia Letlow , 01/13/2026