Filing ID #10062549

Financial Disclosure Report

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Filer Information

Name: Hon. Jennifer Wexton
Status: Member
State/District: VA10

Filing Information

Filing Type: Amendment Report
Filing Year: 2022
Filing Date: 08/6/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
ALW LCPS 457 ⇒ MissionSquare MP Trad Growth [MF] Description: \		$1,001 - $15,000	Tax-Deferred		
ALW LCPS 457 ⇒ MSQ AMG TimesSquare Mid Cap Gr [MF]		$1,001 - $15,000	Tax-Deferred		
ALW LCPS 457 ⇒ MSQ Contrafund [MF]		$50,001 - $100,000	Tax-Deferred		
ALW LCPS 457 ⇒ MSQ Virtus NFJ Dividend Value [MF]		$1,001 - $15,000	Tax-Deferred		
ALW Proskauer 401k ⇒ Schwab - Pioneer Large Cap Growth [MF]		$15,001 - $50,000	Tax-Deferred		
ALW Proskauer 401k ⇒ Schwab - Vanguard Institutional Index I [MF]		$15,001 - $50,000	Tax-Deferred		
ALW Proskauer 401k ⇒ Schwab Dodge & Cox Stock Fund [MF]		$15,001 - $50,000	Tax-Deferred		
ALW Proskauer 401k ⇒		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Schwab -Vanguard LifeStrategy Growth Inv [MF]					
ALW rollover IRA ⇒ Fidelity 500 Index Fund [MF]		$15,001 - $50,000	Tax-Deferred		
ALW rollover IRA ⇒ Fidelity Diversified International [MF]		$15,001 - $50,000	Tax-Deferred		
ALW rollover IRA ⇒ Fidelity Dividend Growth [MF]		$15,001 - $50,000	Tax-Deferred		
ALW rollover IRA ⇒ iShares MSCI EAFE ETF [EF]		$1,001 - $15,000	Tax-Deferred		
ALW Roth ⇒ Costco Wholesale Corporation (COST) [ST]		$15,001 - $50,000	Tax-Deferred		
ALW Roth ⇒ Fidelity Century Small Cap Select Investor [MF]		$15,001 - $50,000	Tax-Deferred		
ALW Roth ⇒ Fidelity Contrafund [MF]		$15,001 - $50,000	Tax-Deferred		
ALW Roth ⇒ Powershares QQQ Tr Unit Ser 1 [EF]		$1,001 - $15,000	Tax-Deferred		
ALW Roth ⇒ Spdr Dow Jones Indl Average ETF Tr Unit [EF]		$1,001 - $15,000	Tax-Deferred		
Fidelity Low Priced Stock [MF]		$1,001 - $15,000	None		
JTW Ekko ⇒ Principal LgCap S&P 500 Index [MF]		$1,001 - $15,000	Tax-Deferred		
JTW Ekko ⇒ Principal MidCap S&P 400 Index [MF]		$1,001 - $15,000	Tax-Deferred		
JTW Ekko ⇒ Principal SmallCap S&P Index [MF]		$1,001 - $15,000	Tax-Deferred		
JTW rollover IRA ⇒ Fidelity 500 Index Fund [MF]		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
JTW rollover IRA ⇒ Fidelity Contrafund [MF]		$50,001 - $100,000	Tax-Deferred		
JTW rollover IRA ⇒ Fidelity Freedom 2040 [MF]		$15,001 - $50,000	Tax-Deferred		
JTW rollover IRA ⇒ Fidelity Int'l Discovery [MF]		$1,001 - $15,000	Tax-Deferred		
JTW rollover IRA ⇒ Fidelity Leveraged Company Stock [MF]		$1,001 - $15,000	Tax-Deferred		
PAT Insurance trust ⇒ Fidelity 500 Index Fund [MF]		$100,001 - $250,000	Dividends	$1,001 - $2,500	
PAT Insurance trust ⇒ Fidelity Extd Market Index Premium Class [MF]		$15,001 - $50,000	Dividends	$201 - $1,000	
PAT Insurance trust ⇒ Fidelity Small Cap Index [MF]		$15,001 - $50,000	Dividends	$201 - $1,000	
Vanguard Total Stock Market Index Fund [MF]		$1,001 - $15,000	Tax-Deferred		
VRS Hybrid 401(a) plan [DB]		$1,001 - $15,000	None		

* 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

None disclosed.

Schedule C: Earned Income

Source	Type	Amount
Loudoun County Public Schools	spouse salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Fifth Third Bank	February 2021	Mortgage Loan	$100,001 - $250,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Atlantic Union Bank (FKA Middleburg Bank)	October 2014	Mortgage Loan	$50,001 - $100,000

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

- ALW LCPS 457
- ALW Proskauer 401k
- ALW rollover IRA
- ALW Roth
- JTW Ekko
- JTW rollover IRA
- PAT Insurance trust

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. Jennifer Wexton , 08/6/2024