



Filing ID #10057623

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Eleanor Holmes Norton  
**Status:** Member  
**State/District:** DC00

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 05/2/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brighthouse Financial, Inc. (BHF) [ST] DESCRIPTION: Spinoff from Met Life Inc. Common		\$1 - \$1,000	None		<input type="checkbox"/>
Congressional Federal Credit Union [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DC College Savings Plan (2 Accounts) [5P] LOCATION: DC DESCRIPTION: 2 Accounts; 2 Beneficiaries		\$15,001 - \$50,000	None		<input type="checkbox"/>
MERRILL LYNCH #182 ⇒ Bank Deposit Program [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
MERRILL LYNCH #182 ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
MERRILL LYNCH #182 ⇒ Invesco S&P 500 Low Volatility ETF (SPLV) [EF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
MERRILL LYNCH #182 ⇒ JPMorgan Large Cap Growth Fund A (OLGAX) [MF]		\$250,001 - \$500,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
MERRILL LYNCH #182 ⇒		\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
VictoryShares US Large Cap High Div Volatility Wtd ETF (CDL) [EF]					
MERRILL LYNCH #806 ⇒ Bank Deposit Program [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
MERRILL LYNCH #806 ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$250,001 - \$500,000	None		<input type="checkbox"/>
MERRILL LYNCH #806 ⇒ DC GO BOND 4.0% JUN01 2036 [GS]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
MERRILL LYNCH #806 ⇒ DC Rev NPR MAY13 4.0% APR01 2037 [GS] DESCRIPTION: Redeemed 4/3/23.		None	Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
MERRILL LYNCH #806 ⇒ DC Ser A DEC13 5.0% JUN01 2030 [GS] DESCRIPTION: Redeemed 6/1/23.		None	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
MERRILL LYNCH #806 ⇒ District of Columbia Wtr & Swr Ser C 5%Oct01 2039 [GS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
MERRILL LYNCH #806 ⇒ Invesco S&P 500 Equal Weight ETF [EF] DESCRIPTION: Partial Sale 3/8/23.		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
MERRILL LYNCH #806 ⇒ Invesco S&P 500 Low Volatility ETF [EF] DESCRIPTION: Partial Sale 11/3/23.		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
MERRILL LYNCH #806 ⇒ Metro Wash DC Arpts Auth Dulles Toll Rd 7.85%CI B 0% 10/01/2038 [GS] DESCRIPTION: Redeemed 12/21/23.		None	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
MERRILL LYNCH #806 ⇒ VA St Res Auth Infrastructure 8/14/2019 3 Pct 11/01/2036 [GS] DESCRIPTION: Partial Redemption 10/13/23.		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
MERRILL LYNCH #806 ⇒ VictoryShares US Large Cap High Div Volatility Wtd ETF (CDL) [EF] DESCRIPTION: Monthly Dividend Reinvestments; Partial Sale 8/3/23.		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
MERRILL LYNCH IRA ⇒ Bank of America, NA RASP [BA]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
MERRILL LYNCH IRA ⇒ BlackRock Funds II, BlackRock Multi-Asset Income Ptf Investor A (BAICX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
MERRILL LYNCH IRA ⇒ VanEck Morningstar Wide Moat ETF (MOAT) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Global Equity Portfolio Class S (IGHSX) [MF]  DESCRIPTION: Partial Sale: 6/28/23.		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Intermediate Bond Portfolio Service (IPISX) [MF]  DESCRIPTION: Partial Sale: 6/28/23. Purchase: 6/28/23.		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya International Index Portfolio Adviser (IIAX) [MF]  DESCRIPTION: Partial Sale: 6/28/23.		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya International Index Portfolio Service (INTIX) [MF]  DESCRIPTION: Partial Sale: 6/28/23.		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Large Cap Growth Portfolio Adviser (IEOPX) [MF]  DESCRIPTION: Partial Sale: 6/28/23.		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Large Cap Growth Portfolio Service (IEOSX) [MF]  DESCRIPTION: Partial Sale: 6/28/23.		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Retirement Growth Portfolio Adviser (IRGPX) [MF]  DESCRIPTION: Partial Sale: 6/28/23.		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Russell Large Cap Index Portfolio Service (IRLCX) [MF]  DESCRIPTION: Partial Sale: 6/28/23.		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Russell Mid Cap Growth Index Portfolio Service (IRGUX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Partial Sale: 6/28/23.					
Met Life Insurance Co Deferred Annuities [OT]		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
DESCRIPTION: IRA-Flexible Purchase Pension Annuity					
MetLife, Inc. (MET) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
ML JOHN HANCOCK ANNUITY ⇒ John Hancock Variable Insurance Trust Core Bond Trust Class NAV (JVCNX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
ML JOHN HANCOCK ANNUITY ⇒ John Hancock Variable Insurance Trust Fundamental Large Cap Value Trust Series Nav (JADIX) [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
ML JOHN HANCOCK ANNUITY ⇒ John Hancock Variable Insurance Trust Managed Volatility Moderate Portfolio Series Nav (JAIVX) [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
ML JOHN HANCOCK ANNUITY ⇒ John Hancock Variable Insurance Trust Real Estate Securities Trust Series Nav (JAJMX) [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
ML JOHN HANCOCK ANNUITY ⇒ John Hancock Variable Insurance Trust Total Stock Market Index Trust Series Nav (JAFEX) [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Synchrony Bank [BA]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
TIAA-CREF Retirement-TIAA Traditional (EIF) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

\* 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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
MERRILL LYNCH #806 ⇒ DC Rev NPR MAY13 4.0% APR01 2037 [GS]		04/3/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: Bond Redemption					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
MERRILL LYNCH #806 ⇒ DC Ser A DEC13 5.0% JUN01 2030 [GS] [GS] DESCRIPTION: Bond Redemption		06/1/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
MERRILL LYNCH #806 ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]		03/8/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
MERRILL LYNCH #806 ⇒ Invesco S&P 500 Low Volatility ETF (SPLV) [EF]		11/3/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
MERRILL LYNCH #806 ⇒ Metro Wash DC Arpts Auth Dulles Toll Rd 7.85%CI B 0% 10/01/2038 [GS] [GS] DESCRIPTION: Bond Redemption		12/21/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
MERRILL LYNCH #806 ⇒ VA St Res Auth Infrastructure 8/14/2019 3 Pct 11/01/2036 [GS] DESCRIPTION: Partial Bond Redemption		10/13/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
MERRILL LYNCH #806 ⇒ VictoryShares US Large Cap High Div Volatility Wtd ETF (CDL) [EF]		08/3/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Global Equity Portfolio Class S (IGHSX) [MF]		06/28/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Intermediate Bond Portfolio Service (IPISX) [MF]		06/28/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Intermediate Bond Portfolio Service (IPISX) [MF]		06/28/2023	P	\$1,001 - \$15,000	
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya International Index Portfolio Adviser (IIIX) [MF]		06/28/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya International Index Portfolio Service (INTIX) [MF]		06/28/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Large Cap Growth Portfolio Adviser (IEOPX) [MF]		06/28/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Large Cap Growth Portfolio Service (IEOSX) [MF]		06/28/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Retirement Growth Portfolio Adviser (IRGPX) [MF]		06/28/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Russell Large Cap Index Portfolio Service (IRLCX) [MF]		06/28/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
MERRILL LYNCH IRA ⇒ VOYA/VY ⇒ Voya Russell Mid Cap Growth Index Portfolio Service (IRGUX) [MF]		06/28/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

\* 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
Pitney Bowes Inc.	Retirement Fee	\$12,000.00
MetLife Pension Annuity	Required Minimum Distribution	\$793.00
Merrill Lynch IRA	Required Minimum Distribution	\$39,259.00

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Trustees	Lawyers Committee for Civil Rights Under Law
Advisory Board Member	Sewall-Belmont House
Advisory Board Member	Women & Politics Institute, American University
Board of Trustees - Honorary Member	Antioch College
Advisory Board Member	Women's Law & Public Policy Fellowship Program, Georgetown University
Executive Committee - Honorary Member	Yale Law School Association

## 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**

- MERRILL LYNCH #182  
LOCATION: US
- MERRILL LYNCH #806  
LOCATION: US
- MERRILL LYNCH IRA
- MERRILL LYNCH IRA ⇒ VOYA/VY
- ML JOHN HANCOCK ANNUITY  
LOCATION: US

**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. Eleanor Holmes Norton , 05/2/2024