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FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Deborah Ross
Status: Member
State/District: NC02

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
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SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AMG Managers Special Equity (IRA) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
AMG Managers Special Equity (Roth) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Duke Retirement Plan ⇒ Vanguard Institutional Target 2030 Retirement Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Brokerage Account ⇒ Fidelity Money Market [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Fidelity Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity IRA 1 ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Albemarle Corporation (ALB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity IRA 1 ⇒ Applied Materials, Inc. (AMAT) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Cleveland-Cliffs Inc. (CLF) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ CrowdStrike Holdings, Inc. - Class A (CRWD) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Fidelity Money Market [BA]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Freeport-McMoRan, Inc. (FCX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Lam Research Corporation (LRCX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ SPDR S&P Bank ETF (KBE) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 1 ⇒ Walt Disney Company (DIS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Fidelity Money Market [BA]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Gilead Sciences, Inc. (GILD) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ iShares MSCI Emerging Index Fund (EEM) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Ishares NASDAQ Biotechnology Fund [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Russell 1000 Value ETF (IWD) [EF]					<input type="checkbox"/>
Fidelity IRA 2 ⇒ iShares Russell 2000 ETF (IWM) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ iShares Semiconductor ETF (SOXX) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ iShares U.S. Home Construction ETF (ITB) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ JP Morgan Chase & Co. (JPM) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Materials Select Sector SPDR (XLB) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ Roundhill Sports Betting & iGaming ETF (BETZ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR MidCap Trust Series I (MDY) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR S&P 500 (SPY) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Industrial [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ SPDR Series Trust SPDR Homebuilders ETF (XHB) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity IRA 2 ⇒ VanEck Gaming ETF (BJK) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 2 ⇒ VanEck Semiconductor ETF (SMH) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA 3 ⇒ Fidelity Money Market [BA]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Direct Rollover of Pension to IRA Money Market Account					
Fidelity Roth IRA ⇒ Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Direxion Moonshot Innovators ETF (MOON) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Money Market [BA]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Invesco Dynamic Leisure and Entertainment ETF (PEJ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Oracle Corporation (ORCL) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ SoFi Social 50 ETF [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Unity Software Inc. (U) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Note this an exchange due to a merger between Ironsource and Unity Software					
Fox Rothschild RSP ⇒ Vanguard Institutional Target 2030 Retirement Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
IAB Brokerage Account (IRA) ⇒ Money Market [BA]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
IAB Brokerage Account (IRA) ⇒ NeoGenomics, Inc. (NEO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Mountain Rental [RP]	SP	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Lansing, NC, US					
Pension - State of North Carolina [PE]		Undetermined	Pension	\$2,501 - \$5,000	<input type="checkbox"/>
Pension - The American Civil Liberties Union [PE]		None	Pension	None	<input type="checkbox"/>
DESCRIPTION: Former pension.					
Primary Residence [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: RALEIGH, NC, US					
RS Growth Fund Class A (IRA) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC Fixed Income Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC International Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC Large Cap Core Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC Large Cap Index Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC Small Mid Cap Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State 401k ⇒ NC Small Mid Cap Index Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
State Employees Credit Union Accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
TTA 401a ⇒ T Rowe Price LCG fund I class [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TTA 401a ⇒ T Rowe Price Overseas Stock Fund I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
TTA 401a ⇒ Voya Fixed Account [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TTA 457(b) ⇒ Fidelity Mid Cap Index fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TTA 457(b) ⇒ Fidelity small Cap Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TTA 457(b) ⇒ T Rowe Price LCG Fund I class [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Transfer from one investment manager to another.					
TTA 457(b) ⇒ Vanguard Target Retirement 2065 [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Unimproved Lot [RP]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
LOCATION: Avon, NC, US					
Vacation Rental [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Salvo, NC, US					
Vanguard 500 Index Fund Admiral (IRA) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Growth Index Fund Admiral [MF]	SP	\$100,001 - \$250,000	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?
Fidelity Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]	JT	01/30/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]	JT	02/1/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]	JT	04/10/2023	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
Legislative Retirement System of NC	Pension	\$4,002.57

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	First National Bank	September 2012	Mortgage-Salvo	\$100,001 - \$250,000
JT	Caliber Home Loans	December 2020	Mortgage for DC residence	\$500,001 - \$1,000,000
JT	Amerisave Mortgage	June 2020	Mortgage for Raleigh Residence	\$250,001 - \$500,000
SP	PNC Bank	August 2023	Credit Card Debt	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2003	Myself and State of North Carolina	Continued participation in employee benefit plan. Vested in legislative pension plan after 5 years of legislative service, serving from 2003 to 2013
January 2003	Myself and State of North Carolina	Continued participation in employee health plan, with lifetime medical benefits upon attaining the age of 60.
September 1994	Myself and American Civil Liberties Union	Continued participation in employee pension plan, vesting after 7 years of service.

SCHEDULE G: GIFTS

Source	Description	Value
Paramount (New York, NY, US)	Attendance, reception and dinner for Kennedy Center Honors	\$2,000.00

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Aspen Institute Inc/BreakthroughEnergyFdn/Climate Imperative	08/26/2023	09/2/2023	Raleigh - Oslo - Bergen - Copenhagen - Raleigh	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Embassy of India (MECEA)	08/9/2023	08/17/2023	Raleigh - Mumbai - Hyderabad - Dehli - Raleigh	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Duke Retirement Plan
- Fidelity Brokerage Account (Owner: JT)
LOCATION: US
- Fidelity IRA 1 (Owner: SP)
- Fidelity IRA 2 (Owner: SP)
- Fidelity IRA 3
- Fidelity Roth IRA (Owner: SP)
- Fox Rothschild RSP
- IAB Brokerage Account (IRA) (Owner: SP)
- State 401k
- TTA 401a
- TTA 457(b)

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. Deborah Ross , 05/12/2024