



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Jeff Jackson
Status: Member
State/District: NC14

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/13/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brokerage Account ⇒ SPDR Portfolio High Yield Bond ETF (SPHY) [EF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Brokerage Account ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Brokerage Account ⇒ Vanguard Federal Money Market [BA]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Brokerage Account ⇒ Vanguard International Dividend Appreciation ETF (VIGI) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Brokerage Account ⇒ Vanguard U.S. Growth Fund (VWUSX) [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Comcast Corporation Retirement - Investment Plan ⇒ Vanguard Target Retirement 2050 Fund (VFIFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Inadvertently reported VTTSX in 2022					
Cryptocurrency ⇒ Ankr [OT]		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Cryptocurrency					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cryptocurrency ⇒ Cardano [OT] DESCRIPTION: Cryptocurrency		None	None		<input checked="" type="checkbox"/>
Cryptocurrency ⇒ Solana [OT] DESCRIPTION: Cryptocurrency; Sold 11/12/2022 - inadvertently reported a value on the 2022 New Filer report.		None	None		<input type="checkbox"/>
Cryptocurrency ⇒ Tether [OT] DESCRIPTION: Cryptocurrency; Sold 11/12/2022 - inadvertently reported a value on the 2022 New Filer report.		None	None		<input type="checkbox"/>
Defined Benefit Pension Plan ⇒ Legislative Retirement System Pension Plan [DB]		Undetermined	Tax-Deferred		<input type="checkbox"/>
Mutual of America Financial Group - 401(k) Plan ⇒ Retirement 2045 Fund (MURMX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Mutual of America Financial Group - 401(k) Plan ⇒ Retirement 2050 Fund (MURNX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Roth IRA ⇒ Vanguard U.S. Growth Fund Admiral Shares (VWUAX) [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
USAA - 529 Plan DC #1 ⇒ Very Aggressive Portfolio [5F] LOCATION: NC	DC	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
USAA - 529 Plan DC #2 ⇒ Age-Based Option 5-6: Growth Portfolio [5F] LOCATION: NC	DC	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Womble Bond Dickinson 401(k) ⇒ Fidelity Total International Index Fund (FTIHX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Womble Bond Dickinson 401(k) ⇒ Fidelity Total Market Index Fund (FSKAX) [MF]		\$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?
Brokerage Account ⇒ SPDR Portfolio High Yield Bond ETF (SPHY) [EF]		07/31/2023	P	\$100,001 - \$250,000	
Cryptocurrency ⇒ Ankr [OT] LOCATION: CHARLOTTE, NC, US DESCRIPTION: Sale of cryptocurrency		01/29/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Cryptocurrency ⇒ Cardano [OT] LOCATION: CHARLOTTE, NC, US DESCRIPTION: Sale of cryptocurrency		01/29/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Mutual of America Financial Group - 401(k) Plan ⇒ Retirement 2045 Fund (MURMX) [MF]	SP	06/30/2023	P	\$1,001 - \$15,000	
USAA - 529 Plan DC #2 ⇒ Age-Based Option 3-4: Aggressive Growth Portfolio [5F] LOCATION: NC DESCRIPTION: Inadvertently reported as USAA Age-Based Portfolio (o-2) on the 2022 New Filer Report.	DC	11/6/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
USAA - 529 Plan DC #2 ⇒ Age-Based Option 5-6: Growth Portfolio [5F] LOCATION: NC	DC	11/6/2023	P	\$1,001 - \$15,000	

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SCHEDULE C: EARNED INCOME

Source	Type	Amount
Levine Jewish Community Center	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Atlantic Bay Mortgage Group	2020	Mortgage on personal residence in Charlotte, NC	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2015	Filer and Womble Bond Dickinson	Continuing participation in a defined contribution plan managed by former employer. Employer no longer contributes to the plan.
May 2014	Filer and Legislative Retirement System	Continuing participation in a employee benefit plan that provides service retirement benefits.

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

- Brokerage Account
LOCATION: US
- Comcast Corporation Retirement - Investment Plan (Owner: SP)
- Cryptocurrency
LOCATION: US
- Defined Benefit Pension Plan
LOCATION: US
- Mutual of America Financial Group - 401(k) Plan (Owner: SP)
- Roth IRA
- USAA - 529 Plan DC #1 (Owner: DC)
LOCATION: NC
- USAA - 529 Plan DC #2 (Owner: DC)
LOCATION: NC
- Womble Bond Dickinson 401(k)

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

COMMENTS

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. Jeff Jackson , 08/13/2024