



Filing ID #10061314

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/8/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ALW Proskauer 401k ⇒ Schwab - Pioneer Large Cap Growth [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ALW Proskauer 401k ⇒ Schwab - Vanguard Institutional Index I [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ALW Proskauer 401k ⇒ Schwab Dodge & Cox Stock Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ALW Proskauer 401k ⇒ Schwab -Vanguard LifeStrategy Growth Inv [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ALW rollover IRA ⇒ Fidelity 500 Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ALW rollover IRA ⇒ Fidelity Diversified International [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ALW rollover IRA ⇒ Fidelity Dividend Growth [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ALW rollover IRA ⇒ iShares MSCI EAFE ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ALW Roth ⇒ Costco Wholesale Corporation (COST) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ALW Roth ⇒ Fidelity Century Small Cap Select Investor [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
ALW Roth ⇒ Fidelity Contrafund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ALW Roth ⇒ Powershares QQQ Tr Unit Ser 1 [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
ALW Roth ⇒ Spdr Dow Jones Indl Average ETF Tr Unit [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
ALW VA Hybrid - 2035 Target Date Portfolio [PE]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Low Priced Stock [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
JTW Ekko ⇒ Principal LgCap S&P 500 Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JTW Ekko ⇒ Principal MidCap S&P 400 Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JTW Ekko ⇒ Principal SmallCap S&P Index [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JTW Mission Square ⇒ MissionSquare MP Trad Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: \					
JTW Mission Square ⇒ MSQ AMG TimesSquare Mid Cap Gr [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JTW Mission Square ⇒ MSQ Contrafund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
JTW Mission Square ⇒ MSQ Virtus NFJ Dividend Value [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JTW rollover IRA ⇒ Fidelity 500 Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
JTW rollover IRA ⇒ Fidelity Contrafund [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
JTW rollover IRA ⇒ Fidelity Freedom 2040 [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
JTW rollover IRA ⇒ Fidelity Int'l Discovery [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
JTW rollover IRA ⇒ Fidelity Leveraged Company Stock [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
PAT Insurance trust ⇒ Fidelity 500 Index Fund [MF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
PAT Insurance trust ⇒ Fidelity Extd Market Index Premium Class [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
PAT Insurance trust ⇒ Fidelity Small Cap Index [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Total Stock Market Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
VRS Hybrid 401(a) plan [DB]		\$1,001 - \$15,000	None		<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

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
JT	Atlantic Union Bank (FKA Middleburg Bank)	October 2014	Mortgage Loan	\$15,001 - \$50,000

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

<ul style="list-style-type: none">◦ ALW Proskauer 401k◦ ALW rollover IRA◦ ALW Roth◦ JTW Ekko◦ JTW Mission Square◦ 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 , 08/8/2024