



Filing ID #10066119

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Daniel Goldman  
**Status:** Member  
**State/District:** NY10

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 08/13/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Daniel Goldman 12/9/2011 Trust ⇒ 12 West Capital Fund LP [HE]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Daniel Goldman 12/9/2011 Trust ⇒ 378 Greenwich Restaurant LLC [OL] LOCATION: New York, NY, US DESCRIPTION: Restaurant COMMENTS: Entity dissolved in 2024		None	None		<input type="checkbox"/>
Daniel Goldman 12/9/2011 Trust ⇒ Cypress Point Technology Fund LP [HE]		\$100,001 - \$250,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman 12/9/2011 Trust ⇒ Exchange Place (Equity Only) All Cap LP [HE] DESCRIPTION: Interest represents both entries on CY 2023 report. Previously reported as two separate entries.		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman 12/9/2011 Trust ⇒ Gilder Gagnon Howe & Co, (J.D.) [HE]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input type="checkbox"/>
Daniel Goldman 12/9/2011 Trust ⇒ Goldman Sachs Bank USA Deposit [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Daniel Goldman 12/9/2011 Trust ⇒		\$500,001 -	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Jottshots! [HE]		\$1,000,000			<input type="checkbox"/>
Daniel Goldman 12/9/2011 Trust ⇒ Schwab - Money Market Fund [BA]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Daniel Goldman 12/9/2011 Trust ⇒ WBF Southampton LLC [HE]		None	None		<input type="checkbox"/>
COMMENTS: Entity dissolved in 2024					
Daniel Goldman 12/9/2011 Trust ⇒ Wishbone Farm Ventures, LLC [HE]		None	None		<input type="checkbox"/>
COMMENTS: Entity dissolved in 2024					
Daniel Goldman 12/9/2011 Trust ⇒ BBR Investments ⇒ BBR Equity Long/Short, QP - Receivable [DO]		None	Interest	\$201 - \$1,000	<input type="checkbox"/>
Daniel Goldman 12/9/2011 Trust ⇒ BBR Investments ⇒ BBR Fixed Income Opportunities Fund, LP [HE]		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Sold for a loss in 2024					
Daniel Goldman 1997 Trust ⇒ Avantor, Inc. (AVTR) [ST]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Transferred from Daniel Goldman 1997 Trust - AWD, LLC					
Daniel Goldman 1997 Trust ⇒ Financial Square Government Fund FST Shares (FGTXX) [MF]		\$100,001 - \$250,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ Lazydays Holdings, Inc. (LAZY) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Transferred from Daniel Goldman 1997 Trust - AWD, LLC					
Daniel Goldman 1997 Trust ⇒ Monte Vista Opportunity Fund I LP [HE]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
DESCRIPTION: Interest transferred from Daniel Goldman 1997 Trust - AWD, LLC - BBR Investments					
Daniel Goldman 1997 Trust ⇒ Monte Vista Real Estate Fund I LLC [HE]		\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: Interest transferred from Daniel Goldman 1997 Trust - AWD, LLC					
Daniel Goldman 1997 Trust ⇒ Presidio NCD III LP [HE]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Interest transferred from Daniel Goldman 1997 Trust - AWD, LLC - BBR Investments					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Daniel Goldman 1997 Trust ⇒ Presidio Northgate PEP II LP [HE]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Interest transferred from Daniel Goldman 1997 Trust - AWD, LLC - BBR Investments					
Daniel Goldman 1997 Trust ⇒ Stevenson Street H.I.G. II LP [HE]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: Interest transferred from Daniel Goldman 1997 Trust - AWD, LLC - BBR Investments					
Daniel Goldman 1997 Trust ⇒ Stevenson Street Matpat II, LP [HE]		None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Interest transferred from Daniel Goldman 1997 Trust - AWD, LLC - BBR Investments					
Daniel Goldman 1997 Trust ⇒ Vantagepoint Venture Ptrs IV, LP [HE]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Interest transferred from Daniel Goldman 1997 Trust - AWD, LLC - BBR Investments					
Daniel Goldman 1997 Trust ⇒ Village Roadshow Entertainment Group [PS]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Entertainment Industry; Transferred from Daniel Goldman 1997 Trust - AWD, LLC					
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ EXCHANGE PLACE (EQUITY ONLY): ALL CAP LP [HE]		None	None		<input type="checkbox"/>
DESCRIPTION: Transferred to Daniel Goldman 1997 Trust - DSG Investment Holdings LLC - Brokerage					
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Absolute Return (QP), LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Absolute Return Long Duration III, LP [HE]		\$500,001 - \$1,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Absolute Return Long Duration IV, LP [HE]		\$500,001 - \$1,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR ALO Fund, LLC [HE]		\$5,000,001 - \$25,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Equity Long/Short (QP), LP [HE]		\$5,000,001 - \$25,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Private Investment Fund-Series I, LP [HE]		\$500,001 - \$1,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Private Investment Fund-Series K, LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Private Investment Fund-Series L, LP [HE]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Real Assets Fund II, LP [HE]		\$250,001 - \$500,000	Partnership Income	\$2,501 - \$5,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Real Assets Fund III, LP [HE]		\$250,001 - \$500,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Real Assets Fund IV, LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Real Assets Fund VI LP [HE]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments ⇒ BBR Real Assets Fund VII, LP [HE]		\$500,001 - \$1,000,000	Partnership Income	\$5,001 - \$15,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ Brokerage ⇒ EXCHANGE PLACE (EQUITY ONLY): ALL CAP LP [HE] DESCRIPTION: Additional interest transferred from Daniel Goldman 1997 Trust - DSG Investment Holdings LLC		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ Brokerage ⇒ GOLDMAN SACHS BANK USA DEPOSIT [BA]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ Brokerage ⇒ S&P Global Inc. (SPGI) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ Master Principal ⇒		\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Financial Square Government Fund FST Shares (FGTXX) [MF]					
Daniel Goldman Grandchildren 1986 Tru ⇒ Goldman 1986 TR Exchange Place ⇒ Exchange Place (Equity Only): All Cap LP [HE]		Over \$50,000,000	Partnership Income	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
DESCRIPTION: Additional interest transferred from Daniel Goldman Grandchildren 1986 Trust -Investment Advisory.					
Daniel Goldman Grandchildren 1986 Tru ⇒ Special Holdings (Trust SA) ⇒ Levi Strauss & Co Class A (LEVI) [ST]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Aristotle Floating Rate Income Fund Class I (PLFRX) [MF]		None	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ BAIN CAPITAL SENIOR LOAN SELECT LLCCLASS A SERIES 1 [OT]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Mutual Fund					
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]		\$5,000,001 - \$25,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ EXCHANGE PLACE (EQUITY ONLY): CLASS A [HE]		None	None		<input type="checkbox"/>
DESCRIPTION: Transferred to Daniel Goldman Grandchildren 1986 Trust - Goldman 1986 TR Exchange Place					
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Financial Square Government Fund FST Shares (FGTXX) [MF]		None	Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: Money Market Fund					
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Goldman Sachs GQG Partners International Opportunities Fund Class P Shares (GGIPX) [MF]		\$1,000,001 - \$5,000,000	Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Goldman Sachs Municipal Income Fund Institutional Shares (GSMTX) [MF]		\$5,000,001 - \$25,000,000	Dividends	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Goldman Sachs Short Duration Tax Free Fund Institutional Shares (GSDUX) [MF]		\$5,000,001 - \$25,000,000	Dividends	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Goldman Sachs Short-Term Conservative Income Fund Institutional Class (GPPIX) [MF]		None	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		None	Capital Gains	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Patient Square Equity Partners Access LLC [HE]		\$500,001 - \$1,000,000	Partnership Income	\$201 - \$1,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ REDBIRD CAPITAL PARTNERS IV AC [HE]		\$500,001 - \$1,000,000	Partnership Income	\$5,001 - \$15,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Tiger Global Crossover Access LLC [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ VINTAGE IX B/VINTAGE REAL ESTATE PARTNERS III ACCESS LP [HE]		\$250,001 - \$500,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Master Income ⇒ Financial Square Government Fund FST Shares (FGTXX) [MF]  DESCRIPTION: Money Market Fund		\$100,001 - \$250,000	Dividends	\$100,001 - \$1,000,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Master Income ⇒ Goldman Sachs - Cash [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ MP ⇒ Financial Square Government Fund FST Shares (FGTXX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Non-US EQ		\$1,000,001 -	Partnership	\$50,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
⇒ Artisan: Dynamic Equity (Non-US Equity) [Series] [OT]  DESCRIPTION: EIF - Pooled Investment Fund		\$5,000,000	Income	\$100,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ BELGARD CAPITAL FUND LLC CLASS II [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ CARLYLE GLOBAL INFRASTRUCTURE OPPORTUNITY FUND [HE]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ CHARLES RIVER REALTY FUND II L P [HE]		\$250,001 - \$500,000	Partnership Income	\$1,001 - \$2,500	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ DOVER STREET X LLC [HE]		\$500,001 - \$1,000,000	Partnership Income	\$201 - \$1,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA INTERNATIONAL PARTNERS, L.P. [HE]		\$15,001 - \$50,000	Partnership Income	\$5,001 - \$15,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA PRIVATE EQUITY III, L.P. [HE]		\$1,001 - \$15,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA PRIVATE EQUITY VIII, L.P. [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA VENTURE CAPITAL IX, L.P. [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA VENTURE CAPITAL VIII, L.P. [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ HIGHVISTA VENTURE CAPITAL X, L.P. [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$50,001 - \$100,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR		\$1,000,001 -	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Holdings ⇒ HIGHVISTA VENTURE CAPITAL XII, LP [HE]		\$5,000,000			<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ LUXOR CAPITAL PARTNERS LIQUIDATING SPV, LLC [HE]		\$1,001 - \$15,000	Partnership Income	\$2,501 - \$5,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ LUXOR CAPITAL PARTNERS, LP [HE]		\$15,001 - \$50,000	Partnership Income	\$5,001 - \$15,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ STEPSTONE VC GLOBAL PARTNERS VIII-B, L.P. [HE]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ Stepstone VC Opportunities VI, L.P. [HE]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ UNICORN PARTNERS FUND III, LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$2,501 - \$5,000	<input type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings ⇒ WAVE EQUITY FUND II LP [HE]		\$1,000,001 - \$5,000,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ Affiliated Managers Group, Inc. (AMG) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ Allegion plc Ordinary Shares (ALLE) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ Bank of America Corporation (BAC) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ Citigroup, Inc. (C) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ Energy Transfer LP Common Units (ET) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ Ingersoll Rand Inc. (IR) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>



Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
E*Trade (Morgan Stanley) - Brokerage ⇒ Meta Platforms, Inc. - Class A (META) [ST]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ Mondelez International, Inc. - Class A (MDLZ) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ Morgan Stanley (MS) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ Morgan Stanley Bank NA [BA]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ The Hershey Company (HSY) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ Trane Technologies plc (TT) [ST]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
E*Trade (Morgan Stanley) - Brokerage ⇒ Walmart Inc. (WMT) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity - Winston & Strawn LLP - 401k ⇒ Vanguard Target Retirement 2035 Fund (VTTHX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
JPM IRA ⇒ The AB Portfolios - AB Balanced Wealth Strategy - Class A (ABWAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Trust #1 ⇒ Schwab Brokerage ⇒ BBR ALO Fund, LLC [HE]	DC	\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Trust #1 ⇒ Schwab Brokerage ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Trust #1 ⇒ Schwab Brokerage ⇒ Fidelity Japan Fund (FJPNX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Trust #1 ⇒ Schwab Brokerage ⇒ Morgan Stanley Institutional Fund - Asia Opportunity Portfolio Class I (MSAQX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Trust #1 ⇒ Schwab Brokerage ⇒ Schwab-Cash [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Trust #1 ⇒ Schwab Brokerage ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Trust #1 ⇒ Schwab Brokerage ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Trust #1 ⇒ Schwab Brokerage ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Trust #2 ⇒ Schwab Brokerage ⇒ BBR ALO Fund, LLC [HE]	DC	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Trust #2 ⇒ Schwab Brokerage ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Trust #2 ⇒ Schwab Brokerage ⇒ Fidelity Japan Fund (FJPNX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Trust #2 ⇒ Schwab Brokerage ⇒ Morgan Stanley Institutional Fund - Asia Opportunity Portfolio Class I (MSAQX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Trust #2 ⇒ Schwab Brokerage ⇒ Schwab-Cash [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Trust #2 ⇒ Schwab Brokerage ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Trust #2 ⇒ Schwab Brokerage ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Trust #2 ⇒ Schwab Brokerage ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Trust #3 ⇒ Schwab Brokerage ⇒ BBR ALO Fund, LLC [HE]	DC	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Trust #3 ⇒ Schwab Brokerage ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Trust #3 ⇒ Schwab Brokerage ⇒ Fidelity Japan Fund (FJPNX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Trust #3 ⇒ Schwab Brokerage ⇒ Morgan Stanley Institutional Fund - Asia Opportunity Portfolio Class I (MSAQX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Trust #3 ⇒ Schwab Brokerage ⇒ Schwab-Cash [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Trust #3 ⇒ Schwab Brokerage ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Trust #3 ⇒ Schwab Brokerage ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Trust #3 ⇒ Schwab Brokerage ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Trust #4 ⇒ Schwab Brokerage ⇒ BBR ALO Fund, LLC [HE]	DC	\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Trust #4 ⇒ Schwab Brokerage ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Trust #4 ⇒ Schwab Brokerage ⇒ Fidelity Japan Fund (FJPNX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Trust #4 ⇒ Schwab Brokerage ⇒ Morgan Stanley Institutional Fund - Asia Opportunity Portfolio Class I (MSAQX) [MF]	DC	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Trust #4 ⇒ Schwab Brokerage ⇒ Schwab-Cash [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Trust #4 ⇒ Schwab Brokerage ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Trust #4 ⇒ Schwab Brokerage ⇒ Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Trust #4 ⇒ Schwab Brokerage ⇒ Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<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?
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Goldman Sachs Short-Term Conservative Income Fund Institutional Class (GPPIX) [MF]		01/03/2024	S	\$5,000,001 - \$25,000,000	<input checked="" type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		01/19/2024	S (partial)	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		06/13/2024	S	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Aristotle Floating Rate Income Fund Class I (PLFRX) [MF]		08/23/2024	S	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]		08/23/2024	S (partial)	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ DFA International Sustainability Core 1 Portfolio (DFSPX) [MF]		11/29/2024	S (partial)	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Goldman Sachs Short Duration Tax Free Fund Institutional Shares (GSDUX) [MF]		01/03/2024	P	\$5,000,001 - \$25,000,000	
Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory ⇒ Goldman Sachs Municipal Income Fund Institutional Shares		01/03/2024	P	\$5,000,001 - \$25,000,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
(GSMTX) [MF]					
Daniel Goldman 12/9/2011 Trust ⇒ BBR Investments ⇒ BBR Fixed Income Opportunities Fund, LP [HE]		01/31/2024	S	\$100,001 - \$250,000	<input type="checkbox"/>
Daniel Goldman 1997 Trust ⇒ Stevenson Street Matpat II, LP [HE]		07/31/2024	S	\$1,001 - \$15,000	<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 C: EARNED INCOME

None disclosed.

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Goldman Sachs	December 2021	Bank Line of Credit	\$25,000,001 - \$50,000,000
	Goldman Sachs	August 2022	Mortgage on personal residence in New York, NY	\$5,000,001 - \$25,000,000
	Northern Trust	November 2021	Mortgage on personal residence in Water Mill, NY	\$5,000,001 - \$25,000,000
	Northern Trust	November 2021	Mortgage on personal residence in Atlantic Beach, NY	\$1,000,001 - \$5,000,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Advisors COMMENTS: Resigned 8/6/2024	Jackson Institute for Global Affairs, Yale University
Board of Directors, Officer	Richard W. Goldman Family Foundation

### SCHEDULE F: AGREEMENTS

None disclosed.

### SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
United Nations Foundation	12/08/2024	12/09/2024	N/A - New York, NY - Washington, DC	0	<input 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

<ul style="list-style-type: none"><li>◦ Daniel Goldman Grandchildren 1986 Trust</li><li>◦ Daniel Goldman 1997 Trust</li><li>◦ Trust #1 (Owner: DC)</li><li>◦ Trust #2 (Owner: DC)</li><li>◦ Trust #3 (Owner: DC)</li><li>◦ Trust #4 (Owner: DC)</li><li>◦ Daniel Goldman 12/9/2011 Trust</li><li>◦ Daniel Goldman Grandchildren 1986 Tru</li><li>◦ JPM IRA (Owner: SP)</li><li>◦ E*Trade (Morgan Stanley) - Brokerage (Owner: SP)</li><li>◦ Fidelity - Winston &amp; Strawn LLP - 401k (Owner: SP)</li><li>◦ Daniel Goldman Grandchildren 1986 Tru ⇒ Special Holdings (Trust SA) LOCATION: US</li><li>◦ Daniel Goldman Grandchildren 1986 Tru ⇒ Goldman 1986 TR Exchange Place</li><li>◦ Daniel Goldman 12/9/2011 Trust ⇒ BBR Investments LOCATION: US</li><li>◦ Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC LOCATION: US</li><li>◦ Daniel Goldman Grandchildren 1986 Trust ⇒ TR Holdings LOCATION: US</li><li>◦ Daniel Goldman Grandchildren 1986 Trust ⇒ Non-US EQ LOCATION: US</li><li>◦ Daniel Goldman Grandchildren 1986 Trust ⇒ Investment Advisory LOCATION: US</li><li>◦ Daniel Goldman Grandchildren 1986 Trust ⇒ Master Income LOCATION: US</li></ul>
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- Daniel Goldman Grandchildren 1986 Trust ⇒ MP  
LOCATION: US
- Trust #1 ⇒ Schwab Brokerage (Owner: DC)  
LOCATION: US
- Trust #2 ⇒ Schwab Brokerage (Owner: DC)  
LOCATION: US
- Trust #3 ⇒ Schwab Brokerage (Owner: DC)  
LOCATION: US
- Trust #4 ⇒ Schwab Brokerage (Owner: DC)  
LOCATION: US
- Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ BBR Investments  
LOCATION: US
- Daniel Goldman 1997 Trust ⇒ DSG Investment Holdings LLC ⇒ Brokerage  
LOCATION: US
- Daniel Goldman 1997 Trust ⇒ Master Principal  
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. Daniel Goldman , 08/13/2025