Filing ID #10066511

Financial Disclosure Report

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Filer Information

Name: Hon. Hakeem S. Jeffries
Status: Member
State/District: NY08

Filing Information

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 05/14/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
ABC's of Democracy [IP]		Undetermined	None		
Description: Book published by Grand Central Publishing. Publishing agreement approved by House Ethics Committee.					
Bank of America Accounts [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	
HSBC Accounts [BA]		$50,001 - $100,000	Interest	$1,001 - $2,500	
Island Federal Credit Union Account [BA]	SP	$15,001 - $50,000	Interest	$1 - $200	
New York Health Care Pension Fund [DB]	SP	Undetermined	None		
New York State Pension [PE]		$15,001 - $50,000	None		
Northwestern Mutual Whole Life Insurance Policy [WU]		$50,001 - $100,000	None		
Northwestern Mutual Whole Life Insurance Policy [WU]	SP	$15,001 - $50,000	None		
Empower - Legal Services 403b Plan ⇒	SP	$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
EuroPacific Growth Fund Cl R-6 (RERGX) [MF] DESCRIPTION: Previously held, appreciated over $1,000 in 2024					
Empower - Legal Services 403b Plan ⇒ Fidelity Total Bond K6 Fund (FTKFX) [MF] DESCRIPTION: Previously held, appreciated over $1,000 in 2024	SP	$1,001 - $15,000	Tax-Deferred		
Empower - Legal Services 403b Plan ⇒ Guaranteed Income Fund [OT] DESCRIPTION: Stable Value Fund; previously held, appreciated over $1,000 in 2024	SP	$1,001 - $15,000	Tax-Deferred		
HSBC Brokerage Account ⇒ Lord Abbett Inv Tr, Lord Abbett Floating Rate Fd -- Cl C (LARCX) [MF]		$15,001 - $50,000	Dividends	$201 - $1,000	✓
Lutheran Medical Center 401K ⇒ Vanguard Equity Income Fund Admiral Shares (VEIRX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Lutheran Medical Center 401K ⇒ Vanguard Target Retirement 2035 Fund (VTTHX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Lutheran Medical Center 401K ⇒ Vanguard Total Bond Market Insti Plus Shares (VBMPX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Merrill Edge Guided Investing Traditional IRA ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [EF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge Guided Investing Traditional IRA ⇒ ISHARES Core S&P U.S. Value ETF (IUSV) [EF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge Guided Investing Traditional IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge Guided Investing Traditional IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [ST]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge Guided Investing Traditional IRA ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]		$1,001 - $15,000	Tax-Deferred		
Merrill Edge Investment Account-Non Retirement ⇒ Merrill Lynch Direct Deposit Program [BA]	JT	$1 - $1,000	None		
Merrill Edge Investment Account-Non Retirement ⇒	JT	$15,001 - $50,000	Capital Gains,	$201 -	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
ProShares S&P MidCap 400 Dividend Aristocrats ETF (REGL) [EF]			Dividends	$1,000	
Merrill Edge Investment Account-Non Retirement ⇒ SPDR S&P Dividend ETF (SDY) [EF]	JT	$50,001 - $100,000	Dividends	$1,001 - $2,500	☐
Merrill Edge Investment Account-Non Retirement ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	$15,001 - $50,000	Capital Gains, Dividends	$201 - $1,000	☑
Merrill Edge Investment Account-Non Retirement - CMA ⇒ Merrill Lynch Direct Deposit Program [BA]		$1,001 - $15,000	None		☐
NY 529 Direct Plan (DC 2) ⇒ Interest Accumulation Portfolio [5F] Location: NY	DC	$1 - $1,000	Tax-Deferred		☑
Principal Trust Company 401K ⇒ BlackRock Lifepath Index Fund 2035 K Fund [MF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Vanguard Brokerage (DC 2) ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	DC	$1,001 - $15,000	Capital Gains	$201 - $1,000	☑

* 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?
HSBC Brokerage Account ⇒ Lord Abbett Inv Tr, Lord Abbett Floating Rate Fd -- Cl C (LARCX) [MF]		01/03/2024	S (partial)	$1,001 - $15,000	☐
NY 529 Direct Plan (DC 2) ⇒ Interest Accumulation Portfolio [5F] Location: NY	DC	02/01/2024	S (partial)	$1,001 - $15,000	☐
Merrill Edge Investment Account-Non Retirement ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	08/02/2024	S (partial)	$1,001 - $15,000	☑
Merrill Edge Investment Account-Non Retirement ⇒ ProShares S&P MidCap 400 Dividend Aristocrats ETF (REGL) [EF]	JT	03/27/2024	S (partial)	$1,001 - $15,000	☑

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Vanguard Brokerage (DC 2) ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	DC	02/03/2024	P	$1,001 - $15,000	
Vanguard Brokerage (DC 2) ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	DC	07/23/2024	P	$1,001 - $15,000	
Vanguard Brokerage (DC 2) ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	DC	02/23/2024	S (partial)	$1,001 - $15,000	☑
Acorn Securities LLC (DC 2) ⇒ Vanguard S&P 500 ETF (VOO) [EF] Description: Appreciated over $1,000 in 2024	DC	02/16/2024	S	$1,001 - $15,000	☐

* 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
Manhattan Legal Services of New York	Spouse Salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	HSBC	March 2021	Primary Residence Mortgage	$250,001 - $500,000
	Truist	January 2017	Mortgage on Washington, DC Residence	$15,001 - $50,000
	Capitol Hill Tower Housing Corporation	January 2017	Share of Coop Mortgage on Washington, DC Residence	$100,001 - $250,000
SP	Bank of America Visa	December 2024	Credit Card	$10,000 - $15,000
	HSBC	June 2022	Home Equity Line of Credit	$100,001 - $250,000
SP	Island Federal Credit Union	December 2024	Credit Card	$10,000 - $15,000
DC	Department of Education/Mohela	August 2024	Student Loan	$15,001 - $50,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
January 2007	New York State Common Retirement Fund/ Hakeem S. Jeffries	Continued participation in a New York State pension plan.

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

- Principal Trust Company 401K (Owner: SP)
- Lutheran Medical Center 401K (Owner: SP)
- Merrill Edge Investment Account-Non Retirement (Owner: JT)
  Location: US
- HSBC Brokerage Account
  Location: US
- Merrill Edge Guided Investing Traditional IRA
- Merrill Edge Investment Account-Non Retirement - CMA
  Location: US
- NY 529 Direct Plan (DC 2) (Owner: DC)
  Location: NY
- Vanguard Brokerage (DC 2) (Owner: DC)
- Acorn Securities LLC (DC 2) (Owner: DC)
- Empower - Legal Services 403b Plan (Owner: SP)

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. Hakeem S. Jeffries , 05/14/2025