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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
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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		
AMG Managers Special Equity (Roth) [MF]		$50,001 - $100,000	Tax-Deferred		
Mountain Rental [RP] Location: Lansing, NC, US	SP	$250,001 - $500,000	Rent	$5,001 - $15,000	
Pension - State of North Carolina [PE]		Undetermined	Pension	$5,001 - $15,000	
Primary Residence [RP] Location: RALEIGH, NC, US	JT	$500,001 - $1,000,000	Rent	$15,001 - $50,000	
RS Growth Fund Class A (IRA) [MF]		$15,001 - $50,000	Tax-Deferred		
State Employees Credit Union Accounts [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	
Unimproved Lot [RP]	SP	$50,001 - $100,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
LOCATION: Avon, NC, US					
Vacation Rental [RP] LOCATION: Salvo, NC, US	JT	$500,001 - $1,000,000	Rent	$50,001 - $100,000	☐
Vanguard 500 Index Fund Admiral [MF]		$100,001 - $250,000	Tax-Deferred		☐
Vanguard Growth Index Fund Admiral [MF]	SP	$100,001 - $250,000	Tax-Deferred		☐
Duke Retirement Plan ⇒ JPMorgan Large Cap Growth Fund R6 (JLGMX) [MF] DESCRIPTION: Transfer from Vanguard Target Ret 2030 Fund within retirement fund		$1,001 - $15,000	Tax-Deferred		☑
Fidelity Brokerage Account ⇒ Fidelity Money Market [BA]	JT	$15,001 - $50,000	Interest	$201 - $1,000	☐
Fidelity Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]	JT	$1,001 - $15,000	Dividends	$1 - $200	☑
Fidelity IRA 1 ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	$15,001 - $50,000	Tax-Deferred		☐
Fidelity IRA 1 ⇒ Albemarle Corporation (ALB) [ST]	SP	$1,001 - $15,000	Tax-Deferred		☐
Fidelity IRA 1 ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	$15,001 - $50,000	Tax-Deferred		☐
Fidelity IRA 1 ⇒ Applied Materials, Inc. (AMAT) [ST]	SP	$15,001 - $50,000	Tax-Deferred		☐
Fidelity IRA 1 ⇒ Cleveland-Cliffs Inc. (CLF) [ST]	SP	$1,001 - $15,000	Tax-Deferred		☐
Fidelity IRA 1 ⇒ CrowdStrike Holdings, Inc. - Class A (CRWD) [ST]	SP	$15,001 - $50,000	Tax-Deferred		☐
Fidelity IRA 1 ⇒ Fidelity Money Market [BA]	SP	$15,001 - $50,000	Tax-Deferred		☐
Fidelity IRA 1 ⇒	SP	$1,001 - $15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Freeport-McMoRan, Inc. (FCX) [ST]					
Fidelity IRA 1 ⇒ Lam Research Corporation (LRCX) [ST]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 1 ⇒ SPDR S&P Bank ETF (KBE) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 1 ⇒ Walt Disney Company (DIS) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity IRA 2 ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ Fidelity Money Market [BA]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ Gilead Sciences, Inc. (GILD) [ST]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ Invesco QQQ Trust, Series 1 [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Fidelity IRA 2 ⇒ iShares Biotechnology ETF (IBB) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ iShares MSCI Emerging Index Fund (EEM) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Fidelity IRA 2 ⇒ iShares Russell 2000 ETF (IWM) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ iShares Semiconductor ETF (SOXX) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ iShares U.S. Home Construction ETF (ITB) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ JP Morgan Chase & Co. (JPM) [ST]	SP	$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity IRA 2 ⇒ Materials Select Sector SPDR (XLB) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ Roundhill Sports Betting & iGaming ETF (BETZ) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity IRA 2 ⇒ SPDR MidCap Trust Series I (MDY) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ SPDR S&P 500 (SPY) [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Fidelity IRA 2 ⇒ SPDR S&P Regional Banking ETF [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Financial [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Industrial [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Fidelity IRA 2 ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ SPDR Series Trust SPDR Homebuilders ETF (XHB) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ VanEck Gaming ETF (BJK) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 2 ⇒ VanEck Semiconductor ETF (SMH) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity IRA 3 ⇒ Fidelity Money Market [BA]		$50,001 - $100,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Roth IRA ⇒	SP	$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity Money Market [BA]					
Fidelity Roth IRA ⇒ Invesco Dynamic Leisure and Entertainment ETF (PEJ) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Oracle Corporation (ORCL) [ST]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity Roth IRA ⇒ SoFi Social 50 ETF [EF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Unity Software Inc. (U) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
Fox Rothschild RSP ⇒ Vanguard Target Retirement 2035 Fund (VTTHX) [MF] DESCRIPTION: Transfer within retirement plan from Vanguard 2030 fund to 2035 fund		$100,001 - $250,000	Tax-Deferred		✓
IAB Brokerage Account (IRA) ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	$15,001 - $50,000	Tax-Deferred		✓
IAB Brokerage Account (IRA) ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]	SP	$15,001 - $50,000	Tax-Deferred		✓
IAB Brokerage Account (IRA) ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	$15,001 - $50,000	Tax-Deferred		✓
IAB Brokerage Account (IRA) ⇒ iShares Russell 2000 ETF (IWM) [EF]	SP	$15,001 - $50,000	Tax-Deferred		✓
IAB Brokerage Account (IRA) ⇒ Money Market [BA]	SP	$1,001 - $15,000	Tax-Deferred		
IAB Brokerage Account (IRA) ⇒ NeoGenomics, Inc. (NEO) [ST]	SP	$1,001 - $15,000	Tax-Deferred		
IAB Brokerage Account (IRA) ⇒ SPDR S&P 500 (SPY) [EF]	SP	$15,001 - $50,000	Tax-Deferred		✓
IAB Brokerage Account (IRA) ⇒ SPDR Series Trust SPDR Portfolio S&P 500 High Dividend ETF (SPYD) [EF]	SP	$15,001 - $50,000	Tax-Deferred		✓
State 401k ⇒		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
NC Fixed Income Fund [MF]					
State 401k ⇒ NC International Fund [MF]		$50,001 - $100,000	Tax-Deferred		
State 401k ⇒ NC Large Cap Core Fund [MF]		$250,001 - $500,000	Tax-Deferred		
State 401k ⇒ NC Large Cap Index Fund [MF]		$100,001 - $250,000	Tax-Deferred		
State 401k ⇒ NC Small Mid Cap Fund [MF]		$15,001 - $50,000	Tax-Deferred		
State 401k ⇒ NC Small Mid Cap Index Fund [MF]		$100,001 - $250,000	Tax-Deferred		
TTA 401a ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF] DESCRIPTION: Purchase of fund from cash account within retirement fund		$1,001 - $15,000	Tax-Deferred		✓
TTA 401a ⇒ T Rowe Price LCG fund I class [MF]		$1,001 - $15,000	Tax-Deferred		
TTA 401a ⇒ T Rowe Price Overseas Stock Fund I [MF]		$1,001 - $15,000	Tax-Deferred		
TTA 401a ⇒ Voya Fixed Account [BA]		$1 - $1,000	Tax-Deferred		
TTA 457(b) ⇒ Fidelity Mid Cap Index fund [MF]		$15,001 - $50,000	Tax-Deferred		
TTA 457(b) ⇒ Fidelity small Cap Index Fund [MF]		$15,001 - $50,000	Tax-Deferred		
TTA 457(b) ⇒ T Rowe Price LCG Fund I class [MF]		$100,001 - $250,000	Tax-Deferred		
TTA 457(b) ⇒ Vanguard Target Retirement 2065 [MF]		$15,001 - $50,000	Tax-Deferred		

* 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 - Common Stock (MSFT) [ST]	JT	04/17/2024	S (partial)	$1,001 - $15,000	✓
IAB Brokerage Account (IRA) ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	09/16/2024	P	$15,001 - $50,000	
IAB Brokerage Account (IRA) ⇒ iShares Russell 2000 ETF (IWM) [EF]	SP	09/16/2024	P	$15,001 - $50,000	
IAB Brokerage Account (IRA) ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	09/16/2024	P	$15,001 - $50,000	
IAB Brokerage Account (IRA) ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]	SP	09/16/2024	P	$15,001 - $50,000	
IAB Brokerage Account (IRA) ⇒ SPDR S&P 500 (SPY) [EF]	SP	09/16/2024	P	$15,001 - $50,000	
TTA 401a ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF] Description: Purchase of fund in retirement account from cash account within fund		10/21/2024	P	$1,001 - $15,000	
Fox Rothschild RSP ⇒ Vanguard Target Retirement 2030 Fund (VTHRX) [MF] Description: Transfer from one fund to another within retirement plan		11/08/2024	S	$100,001 - $250,000	☐
Fox Rothschild RSP ⇒ Vanguard Target Retirement 2035 Fund (VTTHX) [MF] Description: Transfer from one fund to another within retirement plan		11/08/2024	P	$100,001 - $250,000	
Fidelity Roth IRA ⇒ Direxion Moonshot Innovators ETF (MOON) [EF] Description: This was a liquidation of ETF by fund manager.	SP	07/30/2024	S	$1,001 - $15,000	☐
IAB Brokerage Account (IRA) ⇒ SPDR Series Trust SPDR Portfolio S&P 500 High Dividend ETF (SPYD) [EF]	SP	09/16/2024	P	$15,001 - $50,000	
Duke Retirement Plan ⇒ Vanguard Target Retirement 2030 Fund (VTHRX) [MF] Description: Transfer from one fund to another within retirement plan		10/21/2024	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Duke Retirement Plan ⇒ JPMorgan Large Cap Growth Fund R6 (JLGMX) [MF] Description: Transfer from one fund to another within retirement account		10/21/2024	P	$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
Legislative Retirement System of NC	Pension	$7,412.16

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	Navy Federal Credit Union	July 2024	Credit Card Debt	$15,001 - $50,000

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.

Schedule G: Gifts

Source	Description	Value
Paramount (New York, NY) (New York, NY, US)	Reception and attendance at Kennedy Center Honors for 2	$11,724.00

Schedule H: Travel Payments and Reimbursements

Trip Details					Inclusions		
Source	**Start Date**	**End Date**	**Itinerary**	**Days at Own Exp.**	**Lodging?**	**Food?**	**Family?**
US Association of Former Members of Congress	03/23/2024	03/29/2024	Raleigh, NC - Seoul, South Korea - Busan, South Korea - Raleigh NC	0	☑	☑	☑
FMC in Partnership with German Ministry of Foreign Affairs	06/28/2024	07/03/2024	Raleigh, NC - Dusseldorf, Germany - Berlin, Germany - Potsdam Germany - Raleigh, NC	0	☑	☑	☐
Council on Foreign Relations	07/12/2024	07/14/2024	Raleigh, NC - New York, NY - Raleigh, NC	0	☑	☑	☑
Aspen Institute, Inc Congressional Program	08/10/2024	08/16/2024	Raleigh, NC - Dublin, Ireland - Belfast, Northern Ireland - Raleigh, NC	0	☑	☑	☑

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

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

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 , 05/14/2025