



Filing ID #10067322

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Mikie Sherrill
Status: Member
State/District: NJ11

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?
Townhouse [RP] LOCATION: Washington, DC, US DESCRIPTION: Residential rental property in Washington, DC COMMENTS: Assessment value \$1,545,980	JT	\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
USAA - CD [BA] COMMENTS: Value on 12/31/2024 \$257,782	JT	\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
USAA - Checking [BA] COMMENTS: Value on 12/31/2024 \$84,929	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
USAA - Savings [BA] COMMENTS: Value on 12/31/2024 \$2,295	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
USAA - Savings [BA] COMMENTS: Value on 12/31/2024 \$5,032	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Brokerage 90126 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF] COMMENTS: Value on 12/31/2024 \$281,177	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brokerage 90126 ⇒ iShares Core High Dividend ETF (HDV) [EF] COMMENTS: Value on 12/31/2024 \$206,671	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Brokerage 90126 ⇒ iShares Core S&P 500 ETF (IVV) [EF] COMMENTS: Value on 12/31/2024 \$294,340	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Brokerage 90126 ⇒ iShares MSCI ACWI ex U.S. ETF (ACWX) [EF] COMMENTS: Value on 12/31/2024 \$159,870	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Brokerage 90126 ⇒ iShares MSCI EAFE ETF (EFA) [EF] COMMENTS: Value on 12/31/2024 \$273,028	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Brokerage 90126 ⇒ iShares Russell 1000 Growth ETF (IWF) [EF] COMMENTS: Value on 12/31/2024 \$320,059	JT	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Brokerage 90126 ⇒ iShares S&P 500 Growth ETF (IVW) [EF] COMMENTS: Value on 12/31/2024 \$298,092	JT	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Brokerage 90126 ⇒ SPDR Gold Trust (GLD) [EF] COMMENTS: A portion of shares were gifted as part of charitable giving. Value remaining on 12/31/2024 \$35,109	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Brokerage 90126 ⇒ SPDR S&P 500 (SPY) [EF] COMMENTS: Value on 12/31/2024 \$774,212	JT	\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Brokerage 90126 ⇒ SPDR Select Sector Fund - Technology (XLK) [EF] COMMENTS: Value on 12/31/2024 \$366,917	JT	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Brokerage 90126 ⇒ UBS Bank USA Dep Acct [BA] COMMENTS: Value on 12/31/2024 \$2,350	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Brokerage 90126 ⇒ UBS Group AG Registered Ordinary Shares (UBS) [ST] DESCRIPTION: Shares received as compensation (employee benefit). Sold in March 2025. COMMENTS: Value on 12/31/2024 \$16,130	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brokerage 90126 ⇒ UBS Prime Reserves Fund (UPRXX) [MF] DESCRIPTION: Money Market Fund COMMENTS: Value on 12/31/2024 \$1,047,367	JT	\$1,000,001 - \$5,000,000	Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Brokerage 90126 ⇒ Vanguard Mid-Cap ETF (VO) [EF] COMMENTS: Value on 12/31/2024 \$273,375	JT	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Brokerage 90126 ⇒ Vanguard Utilities ETF (VPU) [EF] COMMENTS: Value on 12/31/2024 \$79,259	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
EquatePlus ⇒ UBS Group AG Registered Ordinary Shares (UBS) [RS] DESCRIPTION: Unvested shares received as part of spouse's compensation package from UBS. Unvested shares are subject to forfeiture upon departure from UBS. COMMENTS: Unvested value based on UBS share price on 12/31/2024 \$1,937,114	SP	Spouse/DC Over \$1,000,000	None		<input type="checkbox"/>
Fidelity - UTMA ⇒ Fidelity New York AMT Tax-Free Money Market Fund (FSNXX) [MF] DESCRIPTION: Money Market Fund COMMENTS: Value on 12/31/2024 \$5,875	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity 529 1 ⇒ Fidelity Advisor 529 Limited Term Bond Portfolio: Class I (FPUIX) [MF] COMMENTS: Value on 12/31/2024 \$264,957	DC	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 529 2 ⇒ Fidelity Advisor 529 Limited Term Bond Portfolio: Class I (FPUIX) [MF] COMMENTS: Value on 12/31/2024 \$227,124	DC	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 529 3 ⇒ Fidelity Advisor 529 Limited Term Bond Portfolio: Class I (FPUIX) [MF] COMMENTS: Value on 12/31/2024 \$274,048	DC	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Fidelity 529 4 ⇒ Fidelity Advisor 529 Limited Term Bond Portfolio: Class I (FPUIX) [MF] COMMENTS: Value on 12/31/2024 \$201,696	DC	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Mass Mutual ⇒ Mass Mutual Whole Life Legacy 100 [WU] COMMENTS: Net cash value on 12/31/2024 \$87,017		\$50,001 - \$100,000	None		<input type="checkbox"/>
Mass Mutual ⇒ Mass Mutual Whole Life Legacy 100 [WU] COMMENTS: Net cash value on 12/31/2024 \$179,649	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Mass Mutual ⇒ Mass Mutual Whole Life Legacy 100 [WU] COMMENTS: Net cash value on 12/31/2024 \$322,070	SP	\$250,001 - \$500,000	None		<input type="checkbox"/>
Mass Mutual ⇒ Mass Mutual Whole Life Legacy 15 Pay [WU] COMMENTS: Net cash value on 12/31/2024 \$51,854	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
Rollover IRA 90127 ⇒ IRA Cash [BA] COMMENTS: Value on 12/31/2024 \$7,945	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF] COMMENTS: Value on 12/31/2024 \$12,580	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF] COMMENTS: Value on 12/31/2024 \$35,927	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ iShares Core MSCI Europe ETF (IEUR) [EF] COMMENTS: Value on 12/31/2024 \$37,570	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF] COMMENTS: Value on 12/31/2024 \$97,937	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Rollover IRA 90127 ⇒ iShares MSCI Eurozone ETF (EZU) [EF] COMMENTS: Value on 12/31/2024 \$19,022	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ Ishares MSCI India ETF (INDA) [EF] COMMENTS: Value on 12/31/2024 \$12,897	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares MSCI Japan Index Fund (EWJ) [EF] COMMENTS: Value on 12/31/2024 \$30,262					<input type="checkbox"/>
Rollover IRA 90127 ⇒ iShares MSCI United Kingdom ETF (EWU) [EF] COMMENTS: Value on 12/31/2024 \$17,357	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ JPMorgan BetaBuilders Developed Asia Pacific-ex Japan ETF (BBAX) [EF] COMMENTS: Value on 12/31/2024 \$14,381	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ Materials Select Sector SPDR (XLB) [EF] COMMENTS: Value on 12/31/2024 \$7,909	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF] COMMENTS: Value on 12/31/2024 \$6,670	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF] COMMENTS: Value on 12/31/2024 \$22,659	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF] COMMENTS: Value on 12/31/2024 \$15,172	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF] COMMENTS: Value on 12/31/2024 \$8,823	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ SPDR Select Sector Fund - Financial (XLF) [EF] COMMENTS: Value on 12/31/2024 \$27,306	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF] COMMENTS: Value on 12/31/2024 \$20,223	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF] COMMENTS: Value on 12/31/2024 \$17,656	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rollover IRA 90127 ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF] COMMENTS: Value on 12/31/2024 \$7,266	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF] COMMENTS: Value on 12/31/2024 \$23,234	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ Vanguard Growth ETF (VUG) [EF] COMMENTS: Value on 12/31/2024 \$24,626	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ Vanguard Information Tech ETF (VGT) [EF] COMMENTS: Value on 12/31/2024 \$67,776	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ Vanguard Mid-Cap ETF (VO) [EF] COMMENTS: Value on 12/31/2024 \$72,372	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 90127 ⇒ Vanguard Value ETF (VTV) [EF] COMMENTS: Value on 12/31/2024 \$20,824	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ IRA Cash [BA] COMMENTS: Value on 12/31/2024 \$4,068		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF] COMMENTS: Value on 12/31/2024 \$4,287		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF] COMMENTS: Value on 12/31/2024 \$12,272		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ iShares Core MSCI Europe ETF (IEUR) [EF] COMMENTS: Value on 12/31/2024 \$12,793		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF] COMMENTS: Value on 12/31/2024 \$17,513		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rollover IRA 95031 ⇒ iShares MSCI Eurozone ETF (EZU) [EF] COMMENTS: Value on 12/31/2024 \$6,514		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ Ishares MSCI India ETF (INDA) [EF] COMMENTS: Value on 12/31/2024 \$4,422		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ iShares MSCI Japan Index Fund (EWJ) [EF] COMMENTS: Value on 12/31/2024 \$10,333		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ iShares MSCI United Kingdom ETF (EWU) [EF] COMMENTS: Value on 12/31/2024 \$5,933		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ JPMorgan BetaBuilders Developed Asia Pacific-ex Japan ETF (BBAX) [EF] COMMENTS: Value on 12/31/2024 \$4,924		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ Materials Select Sector SPDR (XLB) [EF] COMMENTS: Value on 12/31/2024 \$2,692		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF] COMMENTS: Value on 12/31/2024 \$2,278		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF] COMMENTS: Value on 12/31/2024 \$7,628		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF] COMMENTS: Value on 12/31/2024 \$5,188		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF] COMMENTS: Value on 12/31/2024 \$2,998		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rollover IRA 95031 ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
COMMENTS: Value on 12/31/2024 \$9,328					
Rollover IRA 95031 ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
COMMENTS: Value on 12/31/2024 \$6,879					
Rollover IRA 95031 ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
COMMENTS: Value on 12/31/2024 \$6,061					
Rollover IRA 95031 ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
COMMENTS: Value on 12/31/2024 \$2,498					
Rollover IRA 95031 ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
COMMENTS: Value on 12/31/2024 \$7,938					
Rollover IRA 95031 ⇒ Vanguard Growth ETF (VUG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
COMMENTS: Value on 12/31/2024 \$8,209					
Rollover IRA 95031 ⇒ Vanguard Information Tech ETF (VGT) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
COMMENTS: Value on 12/31/2024 \$23,007					
Rollover IRA 95031 ⇒ Vanguard Mid-Cap ETF (VO) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
COMMENTS: Value on 12/31/2024 \$39,620					
Rollover IRA 95031 ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
COMMENTS: Value on 12/31/2024 \$7,111					
The Rebecca Michelle Sherrill 2014 Irrevocable Family Trust ⇒ Mass Mutual Whole Life Legacy 100 [WU]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: Previously reported as being owned individually by the filer.					
COMMENTS: Net cash value on 12/31/2024 \$73,096					
UBS 401K ⇒ Vanguard Target Retirement 2035 Fund (VTTHX) [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		<input checked="" type="checkbox"/>
COMMENTS: Value on 12/31/2024 \$530,501					

* 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 90126 ⇒ UBS Group AG Registered Ordinary Shares (UBS) [ST]	JT	05/13/2024	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>
Brokerage 90126 ⇒ UBS Group AG Registered Ordinary Shares (UBS) [ST]	JT	05/14/2024	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Brokerage 90126 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	JT	08/02/2024	P	\$100,001 - \$250,000	
Brokerage 90126 ⇒ Vanguard Mid-Cap ETF (VO) [EF]	JT	08/02/2024	P	\$100,001 - \$250,000	
Brokerage 90126 ⇒ SPDR S&P 500 (SPY) [EF]	JT	04/02/2024	P	\$15,001 - \$50,000	
UBS 401K ⇒ Vanguard Target Retirement 2035 Fund (VTTHX) [MF]	SP	02/14/2024	P	\$15,001 - \$50,000	
UBS 401K ⇒ Vanguard Target Retirement 2035 Fund (VTTHX) [MF]	SP	02/27/2024	P	\$1,001 - \$15,000	
Rollover IRA 90127 ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	SP	08/02/2024	P	\$15,001 - \$50,000	
Rollover IRA 95031 ⇒ Vanguard Mid-Cap ETF (VO) [EF]		08/02/2024	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
UBS Securities LLC	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	UBS	April 2021	Residential Mortgage	\$1,000,001 - \$5,000,000
SP	UBS	September 2016	Residential Mortgage	\$250,001 - \$500,000
SP	UBS	May 2021	Residential Mortgage	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

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?
Mikie Sherrill for Governor	11/19/2024	11/21/2024	Montclair, NJ - Atlantic City, NJ - Montclair, NJ	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMENTS: Mileage reimbursement and lodging for travel related to gubernatorial campaign.							
Mikie Sherrill for Governor	12/06/2024	12/08/2024	Washington, DC - Los Angeles, CA - Newark, NJ	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMENTS: Airfare and lodging for travel related to gubernatorial campaign.							

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Rollover IRA 95031
- Rollover IRA 90127 (Owner: SP)
- UBS 401K (Owner: SP)
- Fidelity 529 1 (Owner: DC)

LOCATION: NJ

- Fidelity 529 2 (Owner: DC)
LOCATION: NJ
- Fidelity 529 3 (Owner: DC)
LOCATION: NJ
- Fidelity 529 4 (Owner: DC)
LOCATION: NJ
- Mass Mutual
- Mass Mutual (Owner: SP)
- Brokerage 90126 (Owner: JT)
LOCATION: US
- EquatePlus (Owner: SP)
LOCATION: US
- Fidelity - UTMA (Owner: DC)
LOCATION: US
- The Rebecca Michelle Sherrill 2014 Irrevocable Family Trust (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

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. Mikie Sherrill , 08/13/2025