Filing ID #10063246

Financial Disclosure Report

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

Filer Information

Name: Hon. Jeff Jackson
Status: Former Member
State/District: NC14

Filing Information

Filing Type: Terminated Filer Report
Filing Year: 2025
Filing Date: 05/02/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Brokerage Account ⇒ SPDR Portfolio High Yield Bond ETF (SPHY) [EF]		$100,001 - $250,000	Dividends	$2,501 - $5,000	
Brokerage Account ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		$1,001 - $15,000	None		
Brokerage Account ⇒ Vanguard Federal Money Market [BA]		$1 - $1,000	None		
Brokerage Account ⇒ Vanguard International Dividend Appreciation ETF (VIGI) [EF]		$1,001 - $15,000	None		
Brokerage Account ⇒ Vanguard U.S. Growth Fund (VWUSX) [MF]		$15,001 - $50,000	None		
Comcast Corporation Retirement - Investment Plan ⇒ Vanguard Target Retirement 2050 Fund (VFIFX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Defined Benefit Pension Plan ⇒ Legislative Retirement System Pension Plan [DB]		Undetermined	Tax-Deferred		
Mutual of America Financial Group - 401(k) Plan ⇒	SP	$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Retirement 2045 Fund (MURMX) [MF]					
Mutual of America Financial Group - 401(k) Plan ⇒ Retirement 2050 Fund (MURNX) [MF]	SP	$100,001 - $250,000	Tax-Deferred		☐
Roth IRA ⇒ Vanguard U.S. Growth Fund Admiral Shares (VWUAX) [MF]		$100,001 - $250,000	Tax-Deferred		☑
USAA - 529 Plan DC #1 ⇒ Very Aggressive Portfolio [5F] LOCATION: NC	DC	$15,001 - $50,000	Tax-Deferred		☐
USAA - 529 Plan DC #2 ⇒ Age-Based Option 5-6: Growth Portfolio [5F] LOCATION: NC	DC	$1,001 - $15,000	Tax-Deferred		☐
Womble Bond Dickinson 401(k) ⇒ Fidelity Total International Index Fund (FTIHX) [MF]		$50,001 - $100,000	Tax-Deferred		☐
Womble Bond Dickinson 401(k) ⇒ Fidelity Total Market Index Fund (FSKAX) [MF]		$100,001 - $250,000	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?
Roth IRA ⇒ Vanguard U.S. Growth Fund Admiral Shares (VWUAX) [MF]		12/18/2024	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
Levine Jewish Community Center	Spouse salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Atlantic Bay Mortgage Group	2020	Mortgage on personal residence in Charlotte, NC	$250,001 - $500,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
May 2015	Filer and Womble Bond Dickinson	Continuing participation in a defined contribution plan managed by former employer. Employer no longer contributes to the plan.
May 2014	Filer and Legislative Retirement System	Continuing participation in a employee benefit plan that provides service retirement benefits.

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

- Womble Bond Dickinson 401(k)
- Roth IRA
- Brokerage Account
  Location: US
- Defined Benefit Pension Plan
  Location: US
- Mutual of America Financial Group - 401(k) Plan (Owner: SP)
- Comcast Corporation Retirement - Investment Plan (Owner: SP)
- USAA - 529 Plan DC #1 (Owner: DC)
  Location: NC
- USAA - 529 Plan DC #2 (Owner: DC)
  Location: NC

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 (x) 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 (x) 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 (x) No

Certification and Signature

[x] 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. Jeff Jackson , 05/02/2025