Filing ID #10063337

Financial Disclosure Report

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Filer Information

Name: Hon. Jerry Lee Carl
Status: Former Member
State/District: AL01

Filing Information

Filing Type: Terminated Filer Report
Filing Year: 2025
Filing Date: 01/31/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
AXA Life Insurance ⇒ AXA Large Cap Growth Managed Volatiity [OT] Description: Fund in Life Insurance		$50,001 - $100,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	☐
AXA Life Insurance ⇒ AXA Moderate Allocation [OT] Description: Fund in Life Insurance		$1,001 - $15,000	Capital Gains, Dividends, Interest	$1,001 - $2,500	☐
AXA Life Insurance ⇒ AXA/AB Small Cap Growth [OT] Description: Fund in Life Insurance		$50,001 - $100,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	☐
AXA Life Insurance ⇒ EQ/BlackRock Basic Value Equity [OT] Description: Fund in Life Insurance		$15,001 - $50,000	Capital Gains, Dividends, Interest	$2,501 - $5,000	☐
Community Bank [BA]	SP	$15,001 - $50,000	Interest	$1 - $200	☐
Hancock Whitney Bank [BA]	JT	$100,001 - $250,000	Interest	$1,001 - $2,500	☐
PNC Bank Accounts [BA]	JT	$100,001 - $250,000	Interest	$1,001 - $2,500	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Prudential Annuity ⇒ AST Capital Growth Asset [OT] DESCRIPTION: Fund in Annuity		$250,001 - $500,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	☐
Prudential Annuity ⇒ AST Capital Growth Asset [OT] DESCRIPTION: Fund in Annuity	SP	$250,001 - $500,000	Capital Gains, Dividends, Interest	$5,001 - $15,000	☐
Reliance Standard Life Insurance ⇒ Cash [IH]	SP	$500,001 - $1,000,000	None		☐
River Oaks Landing LLC [OL] LOCATION: Mobile, AL, US DESCRIPTION: River Oaks Landing-Bed and Breakfast		$1,000,001 - $5,000,000	Rent	None	☐
RSA Alabama [DB]		$15,001 - $50,000	Capital Gains, Dividends, Interest	$1,001 - $2,500	☐
Stifel Nicolaus & Company [BA]		$1,000,001 - $5,000,000	Interest	$50,001 - $100,000	☐
Trustmark Bank [BA]	JT	$50,001 - $100,000	Interest	$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

None disclosed.

Schedule C: Earned Income

None disclosed.

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Hancock Whitney	March 2019	Line of Credit	$100,001 - $250,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

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

- AXA Life Insurance
- Prudential Annuity
- Prudential Annuity (Owner: SP)
- Reliance Standard Life Insurance (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. Jerry Lee Carl , 01/31/2025