



Filing ID #10063371

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Garret Graves
Status: Former Member
State/District: LA06

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2025
Filing Date: 02/08/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
529 education-grandchild#1 [5P] LOCATION: LA DESCRIPTION: 529 established and funded by grandparents of our kids. We have no access or control of the fund.	DC	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
529 education-grandchild#2 [5P] LOCATION: LA DESCRIPTION: 529 established and funded by grandparents of our kids. We have no access or control of the fund.	DC	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
529 education-grandchild#3 [5P] LOCATION: LA DESCRIPTION: 529 established and funded by grandparents of our kids. We have no access or control of the fund.	DC	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Arista Networks, Inc. Common Stock (ANET) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
ARK Fintech Innovation ETF (ARKF) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ARK Innovation ETF (ARKK) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
ARK Space Exploration & Innovation ETF (ARKX) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
bank checking/savings accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Barrick Gold Corporation Common Stock (GOLD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Business First Bancshares, Inc. - Common Stock (BFST) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
grandchild#1 trust [OT]	DC	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: trust account established by grandparents for each of their grandkids. We do not any access or control of these accounts.					
grandchild#2 trust [OT]	DC	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: trust account established by grandparents for each of their grandkids. We do not any access or control of these accounts.					
grandchild#3 trust [OT]	DC	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: trust account established by grandparents for each of their grandkids. We do not any access or control of these accounts.					
Louisiana START#1 [5F]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
LOCATION: LA					
DESCRIPTION: We established these accounts for each of our three kids. In Louisiana, there are two components — one that can be used for high school tuition and one that can be used as a regular 529 for college tuition.					
Louisiana START#2 [5F]	DC	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
LOCATION: LA					
DESCRIPTION: We established these accounts for each of our three kids. In Louisiana, there are two components — one that can be used for high school tuition and one that can be used as a regular 529 for college tuition.					
Louisiana START#3 [5F]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: LA					
DESCRIPTION: We established these accounts for each of our three kids. In Louisiana, there are two components — one that can be used for high school tuition and one that can be used as a regular 529 for college tuition.					
Parents' estate trust [OT]		None	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Estate trust shell established by parents. In the event of death of both parents, I am a 1/5 beneficiary. It has NOT been funded.					
Parents' Life Insurance Trust#1 [OT]		\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Life insurance trust established by parents. I am a 1/5th beneficiary in the event of death by both parents.					
Parents' Life Insurance Trust#2 [OT]		\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Life insurance trust established by parents. I am a 1/5th beneficiary in the event of death by both parents.					
PERSHING SQ HLD LTD REG S (PSHZF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Undeveloped Property [RP]		\$1,001 - \$15,000	None		<input type="checkbox"/>
LOCATION: Gulf Shores, AL, US					
DESCRIPTION: Very small ownership percentage of property in Alabama.					
Verizon Communications Inc. Common Stock (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vodafone Group Plc - American Depositary Shares each representing ten Ordinary Shares (VOD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: retirement account from school employment.					
Janus ⇒ Janus Henderson Balanced Fund - D Shares (JANBX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: divested a significant portion of Flex Bond fund and acquired this MF					
Janus ⇒ Janus Henderson Contrarian Fund - D Shares (JACNX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: divested a significant portion of Flex Bond fund and acquired this MF					
Janus ⇒ Janus Henderson Enterprise Fund - D Shares (JANEX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: divested a significant portion of Flex Bond fund and acquired this MF					
Janus ⇒ Janus Henderson Flexible Bond Fund - D Shares (JANFX) [MF]		\$1,001 - \$15,000	Dividends, Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
Janus ⇒ Janus Henderson Global Life Sciences Fund - D Shares (JNGLX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: divested a significant portion of Flex Bond fund and acquired this MF					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Janus ⇒ Janus Henderson Global Research Fund - D Shares (JANWX) [MF] DESCRIPTION: divested a significant portion of Flex Bond fund and acquired this MF		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Janus ⇒ Janus Henderson Global Technology and Innovation Fund D Shares (JNGTX) [MF] DESCRIPTION: divested a significant portion of Flex Bond fund and acquired this MF		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Janus ⇒ Janus Henderson Growth and Income Fund - D Shares (JNGIX) [MF] DESCRIPTION: divested a significant portion of Flex Bond fund and acquired this MF		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Janus ⇒ Janus Henderson Research Fund - D Shares (JNRFX) [MF] DESCRIPTION: divested significant portion of Flex Bond Fund and acquired this MF.		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Janus ⇒ Janus Henderson Triton Fund - D Shares (JANIX) [MF] DESCRIPTION: divested a significant portion of Flex Bond fund and acquired this MF		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
TIAA-CREF Teacher retirement ⇒ CREF Annuity Contract [FN] DESCRIPTION: Spouse's teacher retirement		\$1,001 - \$15,000	None		<input type="checkbox"/>
TIAA-CREF Teacher retirement ⇒ CREF Core Bond Account - Class R1 (QCBMRX) [MF] DESCRIPTION: Spouse's teacher retirement		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
TIAA-CREF Teacher retirement ⇒ CREF Global Equities Account - R1 (QCGLRX) [MF] DESCRIPTION: Spouse's teacher retirement		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
TIAA-CREF Teacher retirement ⇒ CREF Growth Account - R1 (QCGRRX) [MF] DESCRIPTION: Spouse's teacher retirement		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
TIAA-CREF Teacher retirement ⇒ CREF Stock Account - R1 (QCSTRX) [MF] DESCRIPTION: Spouse's teacher retirement		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
TIAA-CREF Teacher retirement ⇒ TIAA Real Estate Account (QREARX) [MF]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA-CREF Teacher retirement ⇒ TIAA Traditional [FN]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>

* 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?
Janus Henderson Flexible Bond Fund - D Shares (JANFX) [MF]		07/08/2024	E	\$50,001 - \$100,000	
DESCRIPTION: Exchanged this fund for between \$1K and \$15k of each JANIX, JNGTX, JANBX, JACNX, JANWX, JNGIX, JNRFX, and JANEX. Also, exchanged for between \$15k-\$50k of JNGLX.					
Coinbase Global, Inc. - Class A Common Stock (COIN) [ST]		01/19/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

* 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
Baton Rouge Area Foundation	spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	MasterCard	Jan 2024	credit card	\$15,001 - \$50,000
JT	PennyMac	Nov 2020	mortgage	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
member	Perkins Oak, LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2008	garret and Louisiana State Employee's Retirement System	Defined benefit program. Same for all state employees hired during the same date range.

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?
The Economic Policy Innovation Center	04/12/2024	04/14/2024	Washington, DC - Hot Springs, VA - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Aspen Institute	04/01/2024	04/06/2024	New Orleans, LA - Milan, Italy - New Orleans, LA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">Janus LOCATION: USTIAA-CREF Teacher retirement (Owner: SP) LOCATION: US DESCRIPTION: Spouse's teacher retirement

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. Garret Graves , 02/08/2025