



Filing ID #10063371

# FINANCIAL DISCLOSURE REPORT

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## 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]	DC	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: LA DESCRIPTION: 529 established and funded by grandparents of our kids. We have no access or control of the fund.					
529 education-grandchild#2 [5P]	DC	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: LA DESCRIPTION: 529 established and funded by grandparents of our kids. We have no access or control of the fund.					
529 education-grandchild#3 [5P]	DC	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: LA DESCRIPTION: 529 established and funded by grandparents of our kids. We have no access or control of the fund.					
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 have 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 have 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 have 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 Depository 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]		\$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 Global Technology and Innovation Fund D Shares (JNGTX) [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					
Janus ⇒ Janus Henderson Growth and Income Fund - D Shares (JNGIX) [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 Research Fund - D Shares (JNRFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: divested significant portion of Flex Bond Fund and acquired this MF.					
Janus ⇒ Janus Henderson Triton Fund - D Shares (JANIX) [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					
TIAA-CREF Teacher retirement ⇒ CREF Annuity Contract [FN]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Spouse's teacher retirement					
TIAA-CREF Teacher retirement ⇒ CREF Core Bond Account - Class R1 (QCBMRX) [MF]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Spouse's teacher retirement					
TIAA-CREF Teacher retirement ⇒ CREF Global Equities Account - R1 (QCGLRX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Spouse's teacher retirement					
TIAA-CREF Teacher retirement ⇒ CREF Growth Account - R1 (QCGRRX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Spouse's teacher retirement					
TIAA-CREF Teacher retirement ⇒ CREF Stock Account - R1 (QCSTRX) [MF]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Spouse's teacher retirement					
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

Source	Trip Details				Inclusions		
	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

- Janus  
LOCATION: US
- TIAA-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