



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Rick Jakious  
**Status:** Congressional Candidate  
**State/District:** MA06

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 02/23/2026  
**Period Covered:** 01/01/2025– 01/26/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AMJ 529 ⇒ AMJ 529 [5F] LOCATION: UT	DC	\$50,001 - \$100,000	None		
PBJ 529 ⇒ PBJ 529 [5F] LOCATION: UT	DC	\$50,001 - \$100,000	None		
Rick IRA ⇒ iShares MBS ETF (MBB) [EF]		\$1,001 - \$15,000	None		
Rick IRA ⇒ Schwab 5-10 Year Corporate Bond ETF (SCH1) [EF]		\$1,001 - \$15,000	None		
Rick IRA ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		\$15,001 - \$50,000	None		
Rick IRA ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		\$15,001 - \$50,000	None		
Rick IRA ⇒		\$15,001 - \$50,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Schwab Fundamental International Equity ETF (FNDF) [EF]					
Rick IRA ⇒ Schwab Fundamental International Small Equity ETF (FNDC) [EF]		\$1,001 - \$15,000	None		
Rick IRA ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		\$15,001 - \$50,000	None		
Rick IRA ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		\$15,001 - \$50,000	None		
Rick IRA ⇒ Schwab Intermediate-Term U.S. Treasury ETF (SCHR) [EF]		\$1,001 - \$15,000	None		
Rick IRA ⇒ Schwab International Equity ETF (SCHF) [EF]		\$15,001 - \$50,000	None		
Rick IRA ⇒ Schwab International Small-Cap Equity ETF (SCHC) [EF]		\$1,001 - \$15,000	None		
Rick IRA ⇒ Schwab Mortgage-Backed Securities ETF (SMBS) [EF]		\$1,001 - \$15,000	None		
Rick IRA ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		\$15,001 - \$50,000	None		
Rick IRA ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]		\$1,001 - \$15,000	None		
Rick IRA ⇒ Schwab U.S. REIT ETF (SCHH) [EF]		\$1,001 - \$15,000	None		
Rick IRA ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		\$15,001 - \$50,000	None		
Rick IRA ⇒ SPDR Bloomberg Emerging Markets Local Bond ETF (EBND) [EF]		\$1,001 - \$15,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Rick IRA ⇒ Xtrackers International Real Estate ETF (HAUZ) [EF]		\$1,001 - \$15,000	None		
Rick Roth IRA ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		\$1,001 - \$15,000	None		
Rick Roth IRA ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		\$1,001 - \$15,000	None		
Rick Roth IRA ⇒ Schwab Fundamental International Equity ETF (FNDF) [EF]		\$1,001 - \$15,000	None		
Rick Roth IRA ⇒ Schwab Fundamental International Small Equity ETF (FNDC) [EF]		\$1 - \$1,000	None		
Rick Roth IRA ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		\$1,001 - \$15,000	None		
Rick Roth IRA ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		\$1,001 - \$15,000	None		
Rick Roth IRA ⇒ Schwab International Equity ETF (SCHF) [EF]		\$1,001 - \$15,000	None		
Rick Roth IRA ⇒ Schwab International Small-Cap Equity ETF (SCHC) [EF]		\$1,001 - \$15,000	None		
Rick Roth IRA ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		\$1,001 - \$15,000	None		
Rick Roth IRA ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]		\$1 - \$1,000	None		
Rick Roth IRA ⇒ Schwab U.S. REIT ETF (SCHH) [EF]		\$1 - \$1,000	None		
Rick Roth IRA ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab U.S. Small-Cap ETF (SCHA) [EF]					
Rick Roth IRA ⇒ Xtrackers International Real Estate ETF (HAUZ) [EF]		\$1 - \$1,000	None		

\* 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 Current Year to Filing	Amount Preceding Year
Town of Marblehead	Spouse Salary	\$107,000.00	\$105,000.00
Seth Moulton for Congress	Salary	N/A	\$75,000.00

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	North Shore Community Action Program
Board Member / Treasurer	Beyond Walls, Inc.

### SCHEDULE F: AGREEMENTS

None disclosed.

### SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

### SCHEDULE A INVESTMENT VEHICLE DETAILS

- PBJ 529 (Owner: DC)  
LOCATION: UT
- AMJ 529 (Owner: DC)  
LOCATION: UT
- Rick IRA
- Rick Roth IRA

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## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**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:** Rick Jakious , 02/23/2026