



Filing ID #10074390

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Robert J. Menendez
Status: Member
State/District: NJ08

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 07/13/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Art.sy, Inc. [PS] DESCRIPTION: Private shares in former employer.	SP	\$15,001 - \$50,000	None		☐
Charles Schwab [BA] DESCRIPTION: Checking & Savings		\$1,001 - \$15,000	None		☐
Chase Bank [BA] DESCRIPTION: Checking & Savings	SP	\$15,001 - \$50,000	None		☐
Artsy - 401(K) ⇒ Vanguard Target Retirement 2055 Fund (VFFVX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		☐
Betterment - IRA ⇒ State Street SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Betterment - IRA ⇒ State Street SPDR Portfolio S&P 500 ETF (SPYM) [EF] DESCRIPTION: Ticker symbol change; previously named State Street SPDR Portfolio S&P 500 ETF (SPLG).	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Betterment - IRA ⇒ State Street SPDR Portfolio S&P 600 Small Cap ETF (SPSM)	SP	\$1,001 - \$15,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
[EF]					
Betterment - IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Betterment - IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Betterment - IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		☒
Betterment - IRA ⇒ Vanguard Value ETF (VTV) [EF]	SP	None	Tax-Deferred		☒
Betterment Brokerage ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]	SP	\$1,001 - \$15,000	None		☒
Betterment Brokerage ⇒ iShares National Muni Bond ETF (MUB) [EF]	SP	\$1,001 - \$15,000	None		☒
Betterment Brokerage ⇒ State Street SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	SP	\$1,001 - \$15,000	None		☐
DESCRIPTION: Purchases less than \$1,000					
Betterment Brokerage ⇒ State Street SPDR Portfolio S&P 500 ETF (SPYM) [EF]	SP	\$1,001 - \$15,000	None		☒
DESCRIPTION: Ticker symbol change; previously named State Street SPDR Portfolio S&P 500 ETF (SPLG).					
Betterment Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Betterment Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Betterment Brokerage ⇒ Vanguard Global ex-U.S. Real Estate ETF (VNQI) [EF]	SP	\$1,001 - \$15,000	None		☐
DESCRIPTION: Appreciated over \$1,000					
Betterment Brokerage ⇒ Vanguard Mid-Cap ETF (VO) [EF]	SP	\$1,001 - \$15,000	None		☐
Betterment Brokerage ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]	SP	\$1,001 - \$15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Betterment Brokerage ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	\$1,001 - \$15,000	None		☐
Betterment Brokerage ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	\$1,001 - \$15,000	None		☐
Betterment Brokerage ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	\$1,001 - \$15,000	None		☒
Betterment Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Betterment Brokerage ⇒ Vanguard Value ETF (VTV) [EF]	SP	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage ⇒ Charles Schwab Bank [BA]	JT	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]	JT	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]	JT	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage ⇒ Schwab Fundamental International Equity ETF (FNDF) [EF]	JT	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage ⇒ Schwab Fundamental International Small Equity ETF (FNDC) [EF] DESCRIPTION: Appreciated over \$1,000	JT	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]	JT	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]	JT	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage ⇒ Schwab International Equity ETF (SCHF) [EF]	JT	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage ⇒	JT	\$1,001 - \$15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab Municipal Bond ETF (SCMB) [EF]					
DESCRIPTION: Purchases less than \$1,000					
Charles Schwab - Brokerage ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]	JT	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]	JT	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage ⇒ Vanguard Tax-Exempt Bond ETF (VTEB) [EF]	JT	\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage #1 ⇒ BlackRock Science and Technology Opportunities Portf Investor A (BGSAX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	☐
Charles Schwab - Brokerage #1 ⇒ Nuveen Flagship New Jersey Muni Bd Fd Cl A (NNJAX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Charles Schwab - Brokerage #1 ⇒ Nuveen High Yield Municipal Bd Fd Class A (NHMAX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Charles Schwab - Brokerage #1 ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage #1 ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage #2 ⇒ Charles Schwab Cash [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
Charles Schwab - Brokerage #2 ⇒ Invesco RAFI Developed Markets ex-U.S. ETF (PXF) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Charles Schwab - Brokerage #2 ⇒ Invesco RAFI Developed Markets ex-U.S. Small-Mid ETF (PDN) [EF]		None	Capital Gains, Dividends	\$201 - \$1,000	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental International Equity ETF (FNDF) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental International Small Equity ETF (FNDC) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☐
DESCRIPTION: Partial sales less than \$1,000					
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Charles Schwab - Brokerage #2 ⇒ Schwab International Equity ETF (SCHF) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Charles Schwab - Brokerage #2 ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☐
DESCRIPTION: Partial sales less than \$1,000					
Charles Schwab - Brokerage #2 ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
DESCRIPTION: Partial sales less than \$1,000					
Charles Schwab - Brokerage #2 ⇒ Schwab U.S. REIT ETF (SCHH) [EF]		\$1,001 - \$15,000	None		☐
Charles Schwab - Brokerage #2 ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☐
DESCRIPTION: Partial sales less than \$1,000					
Charles Schwab - Brokerage #2 ⇒ SPDR Bloomberg Emerging Markets Local Bond ETF (EBND) [EF]		\$1,001 - \$15,000	None		☐
DESCRIPTION: Partial sale less than \$1,000					
Charles Schwab - Brokerage #2 ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
Charles Schwab - Brokerage #2 ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Charles Schwab - Brokerage #2 ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$1 - \$1,000	Capital Gains, Dividends	\$201 - \$1,000	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab - Brokerage #2 ⇒ Vanguard Tax-Exempt Bond ETF (VTEB) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Charles Schwab - Brokerage #2 ⇒ Xtrackers International Real Estate ETF (HAUZ) [EF] DESCRIPTION: Partial sales less than \$1,000		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Charles Schwab - IRA Contributory ⇒ Charles Schwab Bank [BA]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒ Schwab 5-10 Year Corporate Bond ETF (SCH1) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental International Equity ETF (FNDF) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental International Small Equity ETF (FNDC) [EF]		\$1,001 - \$15,000	Tax-Deferred		☒
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒ Schwab Intermediate-Term U.S. Treasury ETF (SCHR) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒ Schwab International Equity ETF (SCHF) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒ Schwab International Small-Cap Equity ETF (SCHC) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒		\$1,001 - \$15,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab Mortgage-Backed Securities ETF (SMBS) [EF]					
Charles Schwab - IRA Contributory ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
DESCRIPTION: Purchases less than \$1,000					
Charles Schwab - IRA Contributory ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Charles Schwab - IRA Contributory ⇒ Vanguard Mortgage-Backed Securities ETF (VMBS) [EF]		None	Tax-Deferred		☒
Lowenstein Sandler - Vanguard - 401(K) ⇒ Columbia Dividend Income Fund Class I3 (CDDYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Information Technology Index Fund Admiral Shs (VITAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Mid-Cap Index Fund Admiral Shares (VIMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Target Retirement 2050 Fund (VFIFX) [MF]		\$100,001 - \$250,000	Tax-Deferred		☐
Peek - 401(K) ⇒ Vanguard Real Estate Index Fund Admiral Shares (VGSLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Peek - 401(K) ⇒ Vanguard Total Bond Market Index Fund Admiral Shares (VBTLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Peek - 401(K) ⇒ Vanguard Total International Bond Index Fd Admiral Shs (VTABX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Peek - 401(K) ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Total International Stock Index Fd Admiral (VTIAX) [MF]					
Peek - 401(K) ⇒ Vanguard Total Stock Market Index Fd Admiral Shs (VTSAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	\$50,001 - \$100,000	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?
Charles Schwab - Brokerage #2 ⇒ Invesco RAFI Developed Markets ex-U.S. ETF (PXF) [EF]		10/07/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Invesco RAFI Developed Markets ex-U.S. ETF (PXF) [EF]		06/05/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Invesco RAFI Developed Markets ex-U.S. ETF (PXF) [EF]		02/10/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Invesco RAFI Developed Markets ex-U.S. Small-Mid ETF (PDN) [EF]		06/05/2025	S	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		09/02/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		11/03/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		10/07/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		08/05/2025	S (partial)	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		11/03/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		09/02/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		02/10/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		09/02/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		04/22/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		04/09/2025	P	\$1,001 - \$15,000	
Charles Schwab - Brokerage #2 ⇒ Schwab International Equity ETF (SCHF) [EF]		02/10/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]		04/22/2025	P	\$1,001 - \$15,000	
Charles Schwab - Brokerage #2 ⇒ Vanguard Tax-Exempt Bond ETF (VTEB) [EF]		11/03/2025	S (partial)	\$1,001 - \$15,000	☐
Charles Schwab - Brokerage #2 ⇒ Vanguard S&P 500 ETF (VOO) [EF]		11/03/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Vanguard Small-Cap ETF (VB) [EF]		06/05/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - Brokerage #2 ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]		06/05/2025	S (partial)	\$1,001 - \$15,000	☒
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental International Small Equity ETF (FNDC) [EF]		04/22/2025	S (partial)	\$1,001 - \$15,000	☐
Charles Schwab - IRA Contributory ⇒ Schwab Mortgage-Backed Securities ETF (SMBS) [EF]		04/22/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab - IRA Contributory ⇒ Vanguard Mortgage-Backed Securities ETF (VMBS) [EF]		04/22/2025	S	\$1,001 - \$15,000	☐
Betterment Brokerage ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]	SP	06/13/2025	P	\$1,001 - \$15,000	
Betterment Brokerage ⇒ iShares National Muni Bond ETF (MUB) [EF]	SP	02/10/2025	P	\$1,001 - \$15,000	
Betterment Brokerage ⇒ iShares National Muni Bond ETF (MUB) [EF]	SP	06/13/2025	S (partial)	\$1,001 - \$15,000	☐
Betterment Brokerage ⇒ iShares National Muni Bond ETF (MUB) [EF]	SP	06/13/2025	P	\$1,001 - \$15,000	
Betterment Brokerage ⇒ SPDR Portfolio S&P 500 ETF (SPLG) [EF]	SP	06/13/2025	P	\$1,001 - \$15,000	
Betterment Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	01/17/2025	P	\$1,001 - \$15,000	
Betterment Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	11/07/2025	P	\$1,001 - \$15,000	
Betterment Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	06/13/2025	P	\$1,001 - \$15,000	
Betterment Brokerage ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	06/13/2025	P	\$1,001 - \$15,000	
Betterment Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	01/17/2025	P	\$1,001 - \$15,000	
Betterment Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	02/20/2025	P	\$1,001 - \$15,000	
Betterment - IRA ⇒ State Street SPDR Portfolio S&P 400 Mid Cap ETF (SPMD) [EF]	SP	06/16/2025	P	\$1,001 - \$15,000	
Betterment - IRA ⇒ State Street SPDR Portfolio S&P 600 Small Cap ETF (SPSM)	SP	06/16/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
[EF]					
Betterment - IRA ⇒ SPDR Portfolio S&P 500 ETF (SPLG) [EF]	SP	06/16/2025	P	\$1,001 - \$15,000	
Betterment - IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	01/03/2025	P	\$1,001 - \$15,000	
Betterment - IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	06/16/2025	P	\$1,001 - \$15,000	
Betterment - IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	01/03/2025	S (partial)	\$1,001 - \$15,000	☐
Betterment - IRA ⇒ Vanguard Value ETF (VTV) [EF]	SP	06/16/2025	S	\$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
Morning Consult	Spouse Salary	N/A
Shop My Shelf Inc.	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Central Loan Administration & Reporting	June 2020	Mortgage on primary residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Congressional Hispanic Leadership Institute

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2023	Filer and Lowenstein Sandler LLP	Continuing participation in a defined contribution plan managed by former employer. Employer no longer contributes to the plan.

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

- Charles Schwab - Brokerage #1
LOCATION: US
- Charles Schwab - Brokerage #2
LOCATION: US
- Charles Schwab - IRA Contributory
- Charles Schwab - Brokerage (Owner: JT)
LOCATION: US
- Lowenstein Sandler - Vanguard - 401(K)
- Artsy - 401(K) (Owner: SP)
- Betterment Brokerage (Owner: SP)
DESCRIPTION: Previously reported as Goldman Sachs - Brokerage
- Peek - 401(K) (Owner: SP)
- Betterment - IRA (Owner: SP)
DESCRIPTION: Previously reported as Goldman Sachs - IRA
- Voya Financial - The Morning Consult LLC 401(K) (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. Robert J. Menendez , 07/13/2026