



Filing ID #10076550

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Hakeem S. Jeffries
Status: Member
State/District: NY08

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 05/15/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ABC's of Democracy [IP]		Undetermined	Royalties	\$50,001 - \$100,000	☐
DESCRIPTION: Book published by Grand Central Publishing. Publishing agreement approved by House Ethics Committee.					
Bank of America [BA]		\$1,001 - \$15,000	None		☐
Bank of America [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	☐
Bank of America [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	☐
Bank of America Accounts [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	☐
HSBC Accounts [BA]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	☐
Island Federal Credit Union Account [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	☐
New York Health Care Pension Fund [DB]	SP	Undetermined	None		☐
New York State Pension [PE]		\$15,001 - \$50,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Northwestern Mutual Whole Life Insurance Policy [WU]		\$50,001 - \$100,000	None		☐
Northwestern Mutual Whole Life Insurance Policy [WU]	SP	\$15,001 - \$50,000	None		☐
Empower - Legal Services 403b Plan ⇒ EuroPacific Growth Fund Cl R-6 (RERGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Empower - Legal Services 403b Plan ⇒ Fidelity Large Cap Growth Index Fund (FSPGX) [MF] DESCRIPTION: Purchases less than \$1,000	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Empower - Legal Services 403b Plan ⇒ Fidelity Total Bond K6 Fund (FTKFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Empower - Legal Services 403b Plan ⇒ Guaranteed Income Fund [OT] DESCRIPTION: Stable Value Fund	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Empower - Legal Services 403b Plan ⇒ Janus Henderson Enterprise Fund - N Shares (JDMNX) [MF] DESCRIPTION: Purchases less than \$1,000	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Empower - Legal Services 403b Plan ⇒ MFS Mid Cap Value Fund Class R6 (MVCKX) [MF] DESCRIPTION: Purchases less than \$1,000	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Empower - Legal Services 403b Plan ⇒ Vanguard Equity Income Fund Admiral Shares (VEIRX) [MF] DESCRIPTION: Purchases less than \$1,000	SP	\$1,001 - \$15,000	Tax-Deferred		☐
HSBC Brokerage Account ⇒ Lord Abbett Inv Tr, Lord Abbett Floating Rate Fd - Cl A (LFRAX) [MF] DESCRIPTION: Previously reported as LARCX; partial share class exchange August 2025		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐
HSBC Brokerage Account ⇒ Lord Abbett Inv Tr, Lord Abbett Floating Rate Fd -- Cl C (LARCX) [MF]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	☒
Lutheran Medical Center 401K ⇒ Vanguard Equity Income Fund Admiral Shares (VEIRX)	SP	\$15,001 - \$50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
[MF]					
Lutheran Medical Center 401K ⇒ Vanguard Target Retirement 2035 Fund (VTTHX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Lutheran Medical Center 401K ⇒ Vanguard Total Bond Market Insti Plus Shares (VBMPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Merrill Edge Guided Investing Traditional IRA ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Merrill Edge Guided Investing Traditional IRA ⇒ iShares Core S&P U.S. Value ETF (IUSV) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Merrill Edge Guided Investing Traditional IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Merrill Edge Guided Investing Traditional IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Merrill Edge Guided Investing Traditional IRA ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Merrill Edge Investment Account-Non Retirement ⇒ ProShares S&P MidCap 400 Dividend Aristocrats ETF (REGL) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Merrill Edge Investment Account-Non Retirement ⇒ SPDR S&P Dividend ETF (SDY) [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	☐
Merrill Edge Investment Account-Non Retirement ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Merrill Edge Investment Account-Non Retirement - CMA ⇒ Merrill Lynch Direct Deposit Program [BA]		None	None		☐
NY 529 Direct Plan (DC 2) ⇒ Interest Accumulation Portfolio [5F]	DC	None	Tax-Deferred		☐
LOCATION: NY DESCRIPTION: Sale less than \$1,000					
NY 529 Direct Plan (DC 2) ⇒ Target Enrollment 2025 [5F]	DC	\$1,001 - \$15,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: NY					
Principal Trust Company 401K ⇒ BlackRock Lifepath Index Fund 2035 K Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Vanguard Brokerage (DC 2) ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	DC	\$1,001 - \$15,000	None		☒
Vanguard Brokerage (DC 2) ⇒ Vanguard S&P 500 ETF (VOO) [EF]	DC	\$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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
HSBC Brokerage Account ⇒ Lord Abbett Inv Tr, Lord Abbett Floating Rate Fd -- Cl C (LARCX) [MF]		01/02/2025	S (partial)	\$1,001 - \$15,000	☐
HSBC Brokerage Account ⇒ Lord Abbett Inv Tr, Lord Abbett Floating Rate Fd -- Cl C (LARCX) [MF]		05/23/2025	P	\$1,001 - \$15,000	
Vanguard Brokerage (DC 2) ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	DC	02/24/2025	S (partial)	\$1,001 - \$15,000	☐
Vanguard Brokerage (DC 2) ⇒ Vanguard S&P 500 ETF (VOO) [EF]	DC	12/01/2025	S (partial)	\$1,001 - \$15,000	☐
Vanguard Brokerage (DC 2) ⇒ Vanguard S&P 500 ETF (VOO) [EF]	DC	12/15/2025	S (partial)	\$1,001 - \$15,000	☐
Vanguard Brokerage (DC 2) ⇒ Vanguard S&P 500 ETF (VOO) [EF]	DC	09/02/2025	P	\$1,001 - \$15,000	
NY 529 Direct Plan (DC 2) ⇒ Target Enrollment 2025 [5F]	DC	05/16/2025	P	\$1,001 - \$15,000	
LOCATION: NY					

* 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
Manhattan Legal Services of New York	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	HSBC	March 2021	Primary Residence Mortgage	\$250,001 - \$500,000
	Truist	January 2017	Mortgage on Washington, DC Residence	\$15,001 - \$50,000
	Capitol Hill Tower Housing Corporation	January 2017	Share of Coop Mortgage on Washington, DC Residence	\$100,001 - \$250,000
SP	Bank of America Visa	December 2025	Credit Card	\$15,001 - \$50,000
JT	HSBC	June 2022	Home Equity Line of Credit	\$100,001 - \$250,000
SP	Island Federal Credit Union	December 2025	Credit Card	\$10,000 - \$15,000
DC	Department of Education/Mohela	August 2024	Student Loan	\$15,001 - \$50,000
SP	Macy's	December 2025	Credit Card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2007	New York State Common Retirement Fund/ Hakeem S. Jeffries	Continued participation in a New York State pension plan.

SCHEDULE G: GIFTS

Source	Description	Value
Catherine B. Davis (Durham, NC, US)	Birthday Gift	\$500.00

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

- Principal Trust Company 401K (Owner: SP)
- Lutheran Medical Center 401K (Owner: SP)
- Merrill Edge Investment Account-Non Retirement (Owner: JT)
LOCATION: US
- HSBC Brokerage Account
LOCATION: US
- Merrill Edge Guided Investing Traditional IRA
- Merrill Edge Investment Account-Non Retirement - CMA
LOCATION: US
- NY 529 Direct Plan (DC 2) (Owner: DC)
LOCATION: NY
- Vanguard Brokerage (DC 2) (Owner: DC)
- Empower - Legal Services 403b Plan (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. Hakeem S. Jeffries , 05/15/2026