



Filing ID #10077397

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Madeleine Dean
Status: Member
State/District: PA04

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?
Bank of America Advanced Tiered Interest Checking [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	☐
Bank of America Wealth Management MMS Money Market Savings Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	☐
Beaver Hill Condominium [RP]	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	☒
LOCATION: Jenkintown, PA, US					
Congressional Federal Credit Union Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	☐
Congressional Federal Credit Union Savings Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	☐
New York Life Insurance Policy [WU]		\$15,001 - \$50,000	None		☐
New York Life Insurance Policy [WU]	SP	\$100,001 - \$250,000	None		☐
Pennsylvania State Employee Retirement System Defined Benefit Plan [DB]		Undetermined	Tax-Deferred		☐
COMMENTS: Rep. Dean began receiving pension payments in 2025, reported as earned income on Schedule C.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Stoker Strategies, 99% Interest [OL] LOCATION: Jenkintown, PA, US DESCRIPTION: Consulting	SP	\$50,001 - \$100,000	None		☐
Bank of America IRA ⇒ Avantis Emerging Markets Equity ETF (AVEM) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Bank of America IRA ⇒ Avantis International Equity ETF (AVDE) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Bank of America IRA ⇒ BlackRock Liquidity Funds Federal Trust Fund - Institutional (TFFXX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ BlackRock Liquidity Funds T-Fund - Institutional (TSTXX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Bank of America IRA ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	☒
Bank of America IRA ⇒ iShares Broad USD High Yield Corporate Bond ETF (USHY) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☐
Bank of America IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [EF]	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	☐
Bank of America IRA ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☐
Bank of America IRA ⇒ iShares MSCI Emerging Markets Min Vol Factor ETF	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
(EEMV) [EF]					
Bank of America IRA ⇒ iShares Russell 2000 Index Fund (IWM) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ JPMorgan U.S. Large Cap Core Plus Fund Class R6 (JLPYX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ JPMorgan U.S. Large Cap Core Plus Fund Class R6 (JLPYX) [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
Bank of America IRA ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]	SP	None	Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ State Street SPDR Portfolio High Yield Bond ETF (SPHY) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☒
Bank of America IRA ⇒ VanEck J. P. Morgan EM Local Currency Bond ET (EMLC) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	☒
Bank of America IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Bank of America IRA ⇒ Vanguard Mid-Cap ETF (VO) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒	SP	\$50,001 -	Capital Gains,	\$5,001 -	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Mid-Cap ETF (VO) [EF]		\$100,000	Dividends	\$15,000	☐
Bank of America IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	☒
Bank of America IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	☒
Bank of America IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	☒
Bank of America IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	☐
Bank of America Roth IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Bank of America Roth IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Pennsylvania State Employees' Deferred Compensation Plan ⇒ International Company Stock Index Fund [OT] DESCRIPTION: Defined contribution plan fund		\$15,001 - \$50,000	Tax-Deferred		☐
Pennsylvania State Employees' Deferred Compensation Plan ⇒ Short-Term Investment Fund [OT] DESCRIPTION: Defined contribution plan fund		\$1,001 - \$15,000	Tax-Deferred		☐
Pennsylvania State Employees' Deferred Compensation Plan ⇒ Stable Value Fund [OT] DESCRIPTION: Defined contribution plan fund		\$50,001 - \$100,000	Tax-Deferred		☐
Pennsylvania State Employees' Deferred Compensation Plan ⇒ U.S. Bond Index Fund [OT] DESCRIPTION: Defined contribution plan fund		\$50,001 - \$100,000	Tax-Deferred		☐
Pennsylvania State Employees' Deferred Compensation Plan ⇒ U.S. Large Company Stock Index Fund [OT] DESCRIPTION: Defined contribution plan fund		\$50,001 - \$100,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Pennsylvania State Employees' Deferred Compensation Plan ⇒ U.S. Small/Mid Company Stock Index Fund [OT] DESCRIPTION: Defined contribution plan fund COMMENTS: Defined contribution plan fund		\$1,001 - \$15,000	Tax-Deferred		☐
TIAA-CREF ⇒ La Salle University DC and TDA Plan ⇒ CREF Core Bond Account - Class R2 (QCBMPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
TIAA-CREF ⇒ La Salle University DC and TDA Plan ⇒ CREF Stock Account - R2 (QCSTPX) [MF]		\$100,001 - \$250,000	Tax-Deferred		☐
TIAA-CREF ⇒ La Salle University DC and TDA Plan ⇒ TIAA Real Estate Account (QREARX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
TIAA-CREF ⇒ La Salle University DC and TDA Plan ⇒ TIAA Traditional [FN]		\$1,001 - \$15,000	None		☐
TIAA-CREF ⇒ La Salle University Tax-Deferred Annuity Plan ⇒ Dodge & Cox Stock Fund - Class I (DODGX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☐
TIAA-CREF ⇒ La Salle University Tax-Deferred Annuity Plan ⇒ JPMorgan Large Cap Growth Fund R6 (JLGMX) [MF]		\$100,001 - \$250,000	Tax-Deferred		☐
TIAA-CREF ⇒ La Salle University Tax-Deferred Annuity Plan ⇒ PGIM Total Return Bond Fund Class Z (PDBZX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
TIAA-CREF ⇒ La Salle University Tax-Deferred Annuity Plan ⇒ TIAA Traditional [FN]		\$50,001 - \$100,000	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?
Beaver Hill Condominium [RP] LOCATION: Jenkintown, PA, US	JT	06/23/2025	P	\$100,001 - \$250,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Bank of America IRA ⇒ BlackRock Liquidity Funds T-Fund - Institutional (TSTXX) [MF]	SP	02/28/2025	S (partial)	\$50,001 - \$100,000	☐
Bank of America IRA ⇒ BlackRock Liquidity Funds T-Fund - Institutional (TSTXX) [MF]	SP	03/31/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒ BlackRock Liquidity Funds T-Fund - Institutional (TSTXX) [MF]	SP	06/30/2025	S (partial)	\$1,001 - \$15,000	☐
Bank of America IRA ⇒ BlackRock Liquidity Funds T-Fund - Institutional (TSTXX) [MF]	SP	07/31/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒ BlackRock Liquidity Funds T-Fund - Institutional (TSTXX) [MF]	SP	10/31/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒ BlackRock Liquidity Funds T-Fund - Institutional (TSTXX) [MF]	SP	12/31/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒ JPMorgan U.S. Large Cap Core Plus Fund Class R6 (JLPYX) [MF]	SP	02/20/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒ JPMorgan U.S. Large Cap Core Plus Fund Class R6 (JLPYX) [MF]	SP	06/06/2025	S (partial)	\$1,001 - \$15,000	☒
Bank of America IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	SP	06/06/2025	S (partial)	\$15,001 - \$50,000	☒
Bank of America IRA ⇒ iShares Russell 2000 Index Fund (IWM) [EF]	SP	02/20/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒ iShares Russell 2000 Index Fund (IWM) [EF]	SP	06/06/2025	S (partial)	\$1,001 - \$15,000	☐
Bank of America IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	06/06/2025	S (partial)	\$1,001 - \$15,000	☒
Bank of America IRA ⇒	SP	06/06/2025	S	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard FTSE Emerging Markets ETF (VWO) [EF]			(partial)		
Bank of America IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	SP	06/06/2025	P	\$15,001 - \$50,000	
Bank of America IRA ⇒ iShares 5-10 Year Investment Grade Corporate Bond ETF (IGIB) [EF]	SP	06/06/2025	P	\$100,001 - \$250,000	
Bank of America IRA ⇒ iShares Broad USD High Yield Corporate Bond ETF (USHY) [EF]	SP	06/06/2025	P	\$15,001 - \$50,000	
Bank of America IRA ⇒ VanEck J. P. Morgan EM Local Currency Bond ET (EMLC) [EF]	SP	06/06/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]	SP	06/06/2025	S	\$15,001 - \$50,000	☐
Bank of America IRA ⇒ JPMorgan U.S. Large Cap Core Plus Fund Class R6 (JLPYX) [MF]		03/18/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒ JPMorgan U.S. Large Cap Core Plus Fund Class R6 (JLPYX) [MF]		06/09/2025	S (partial)	\$1,001 - \$15,000	☒
Bank of America IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]		03/18/2025	S (partial)	\$1,001 - \$15,000	☒
Bank of America IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]		06/09/2025	S (partial)	\$1,001 - \$15,000	☒
Bank of America IRA ⇒ Vanguard Mid-Cap ETF (VO) [EF]		06/09/2025	S (partial)	\$1,001 - \$15,000	☒
Bank of America IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		06/09/2025	S (partial)	\$1,001 - \$15,000	☒
Bank of America IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]		06/09/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒		03/18/2025	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares Core U.S. Aggregate Bond ETF (AGG) [EF]			(partial)		☐
Bank of America IRA ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]		03/18/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]		06/09/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF]		06/09/2025	P	\$1,001 - \$15,000	
Bank of America IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF]		03/18/2025	S (partial)	\$1,001 - \$15,000	☐
Bank of America IRA ⇒ State Street SPDR Portfolio High Yield Bond ETF (SPHY) [EF]		03/18/2025	P	\$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
Stoker Strategies, LLC	Spouse Salary	N/A
Hyper Bicycles Inc.	Spouse Salary	N/A
Pennsylvania State Employees' Retirement System	Pension	\$52,745.88

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Congressional Federal Credit Union	November 2025	Line of Credit	\$10,000 - \$15,000
JT	Congressional Federal Credit Union	December 2024	Home Equity Line of Credit	\$100,001 - \$250,000
JT	Citadel	May 2015	Mortgage on secondary residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2012	Rep. Dean and Pennsylvania State Employees' Retirement System	Defined-benefit part of State Employees' Retirement System retirement benefit

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?
Robert M. Gates Global Policy Center	12/04/2025	12/05/2025	Washington, DC - Williamsburg, VA - Washington, DC	0	☒	☒	☐

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

◦ TIAA-CREF ◦ Pennsylvania State Employees' Deferred Compensation Plan ◦ Bank of America IRA (Owner: SP) ◦ Bank of America Roth IRA (Owner: SP) ◦ Bank of America IRA ◦ Bank of America Roth IRA ◦ TIAA-CREF ⇒ La Salle University Tax-Deferred Annuity Plan ◦ TIAA-CREF ⇒ La Salle University DC and TDA Plan
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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. Madeleine Dean , 05/15/2026