



Filing ID #10081499

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Alexandria Ocasio-Cortez
Status: Member
State/District: NY14

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2025
Filing Date: 08/07/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Allied Bank Savings Account [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	☐
Charles Schwab Bank Checking [BA]		\$1,001 - \$15,000	None		☐
Charles Schwab One Brokerage [BA]		\$1 - \$1,000	Interest	None	☐
National Hispanic Institute Inc 401k Plan ⇒ T. Rowe Price Spectrum Income Fund (RPSIX) [MF]		\$1,001 - \$15,000	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

None disclosed.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	U.S. Dept. of Education	August 2007 - May 2011	Student Loans	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2019	National Hispanic Institute Inc, Alexandria Ocasio Cortez	Continued participation in 401k 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

- National Hispanic Institute Inc 401k Plan

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. Alexandria Ocasio-Cortez , 08/07/2026