



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Jerry Lee Carl  
**Status:** Congressional Candidate  
**State/District:** AL01

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2026  
**Filing Date:** 01/14/2026  
**Period Covered:** 01/01/2024– 09/18/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Community Bank [BA]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Hancock Whitney Bank [BA]	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	\$1,001 - \$2,500
PNC Bank Accounts [BA]	JT	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
RSA Alabama [DB]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Stifel Nicolaus & Company [BA]		\$1,000,001 - \$5,000,000	Interest	\$100,001 - \$1,000,000	\$50,001 - \$100,000
Trustmark Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$201 - \$1,000
AXA Life Insurance ⇒ AXA Large Cap Growth Managed Volatiitiy [OT]		\$50,001 - \$100,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
DESCRIPTION: Fund in Life Insurance					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AXA Life Insurance ⇒ AXA Moderate Allocation [OT] DESCRIPTION: Fund in Life Insurance		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
AXA Life Insurance ⇒ AXA/AB Small Cap Growth [OT] DESCRIPTION: Fund in Life Insurance		\$50,001 - \$100,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
AXA Life Insurance ⇒ EQ/BlackRock Basic Value Equity [OT] DESCRIPTION: Fund in Life Insurance		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
Prudential Annuity ⇒ AST Capital Growth Asset [OT] DESCRIPTION: Fund in Annuity		\$250,001 - \$500,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Prudential Annuity ⇒ AST Capital Growth Asset [OT] DESCRIPTION: Fund in Annuity	SP	\$250,001 - \$500,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Reliance Standard Life Insurance ⇒ Cash [IH]	SP	\$500,001 - \$1,000,000	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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Hancock Whitney	March 2019	Line of Credit	\$100,001 - \$250,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## **SCHEDULE A INVESTMENT VEHICLE DETAILS**

- Prudential Annuity
- Prudential Annuity (Owner: SP)
- AXA Life Insurance
- Reliance Standard Life Insurance (Owner: SP)

## **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:** Hon. Jerry Lee Carl , 01/14/2026