



Filing ID #10077573

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Dr. Jeromie Patrick Whalen
Status: Congressional Candidate
State/District: MA01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2026
Filing Date: 05/15/2026
Period Covered: 01/01/2025– 04/15/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Florence Savings Bank [BA]	JT	\$1,001 - \$15,000	None		
JPM Checking [BA]	SP	\$15,001 - \$50,000	None		
JPM Checking [BA]		\$1 - \$1,000	None		
JPM Savings [BA]	SP	\$1,001 - \$15,000	None		
Massachusetts Teachers' Retirement System (MTRS) [DB]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Massachusetts Teachers' Retirement System retirement account through Northampton Public Schools.					
Residential Property – South Hadley, MA [RP]	SP	\$500,001 - \$1,000,000	None		
LOCATION: MA, MA, US DESCRIPTION: Primary Residence.					
Roth IRA - UBS [OT]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Diversified IRA containing mutual funds, stocks, and bonds. Using "Other" because no IRA category applies (account not held in cash)					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Stellar Lumens (XLM) [CT] DESCRIPTION: Cryptocurrency holding.		\$1,001 - \$15,000	None		
TP ICAP 401(k) [OT] DESCRIPTION: TP ICAP 401(k) retirement account containing mutual funds and retirement investments	SP	\$50,001 - \$100,000	Tax-Deferred		
Traditional IRA - UBS [OT] DESCRIPTION: Diversified IRA containing mutual funds, stocks, and bonds. Using "Other" because no IRA category applies (account not held in cash)	SP	\$250,001 - \$500,000	Tax-Deferred		
Transamerica Whole Life Policy [WU] DESCRIPTION: Cash value life insurance policy.	SP	\$50,001 - \$100,000	None		
UBS Brokerage Account [OT] DESCRIPTION: Diversified UBS brokerage account containing multiple stocks, ETFs, mutual funds, and bonds. Using "Other" because no "Brokerage Account" category was available.	SP	\$500,001 - \$1,000,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Vacant Land - South Hadley MA [RP] LOCATION: MA, MA, US DESCRIPTION: Undeveloped land parcel	SP	\$100,001 - \$250,000	None		
Vacant Land - South Hadley MA [RP] LOCATION: MA, MA, US DESCRIPTION: Undeveloped land parcel	SP	\$15,001 - \$50,000	None		
Vanguard 403b ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF] DESCRIPTION: Vanguard 403(b) retirement account containing mutual funds through Northampton Public Schools		\$100,001 - \$250,000	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 C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
TP ICAP Americas Holdings. Inc.	Spouse Salary	N/A	N/A
Northampton Public Schools	Employment (Self)	N/A	\$45,890.24

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	American Express	March 2026	Revolving credit card balance	\$10,000 - \$15,000
SP	Citibank	May 2022	Revolving credit card balance	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
September 2025	Northampton Public Schools	Year leave of absence from teaching position.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- o Vanguard 403b
DESCRIPTION: Vanguard 403b mutual fund retirement account.
COMMENTS: Held through Northampton Public Schools

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: Dr. Jeromie Patrick Whalen , 05/15/2026