



# PERIODIC TRANSACTION REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Josh Gottheimer

**Status:** Member

**State/District:** NJ05

## TRANSACTIONS

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT	AbbVie Inc. (ABBV) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/18/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	AbbVie Inc. (ABBV) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/09/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Affirm Holdings, Inc. - Class A (AFRM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	02/11/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Align Technology, Inc. (ALGN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/01/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Block, Inc. Class A Common Stock, (SQ) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	02/02/2022	03/07/2022	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Coca-Cola Company (KO) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/03/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT	Coca-Cola Company (KO) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/23/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Enphase Energy, Inc. (ENPH) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/09/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Etsy, Inc. (ETSY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/02/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Fidelity National Information Services, Inc. (FIS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/28/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	ICU Medical, Inc. (ICUI) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/14/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Intel Corporation (INTC) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	02/28/2022	03/07/2022	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JT	Intuit Inc. (INTU) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/03/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Lowe's Companies, Inc. (LOW) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/01/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Meta Platforms, Inc. - Class A (FB) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/07/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Microsoft Corporation (MSFT) [OP] FILING STATUS: New	S	02/10/2022	03/07/2022	\$500,001 - \$1,000,000	<input type="checkbox"/>

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike Price \$160; Expires 1/20/2023					
JT	Microsoft Corporation (MSFT) [OP]	S	02/10/2022	03/07/2022	\$250,001 - \$500,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike Price \$155; Expires 1/20/2023					
JT	Microsoft Corporation (MSFT) [OP]	S	02/10/2022	03/07/2022	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike Price \$150; Expires 1/20/2023					
JT	Microsoft Corporation (MSFT) [OP]	S	02/10/2022	03/07/2022	\$250,001 - \$500,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike Price \$145; Expires 1/20/2023					
JT	Microsoft Corporation (MSFT) [OP]	P	02/10/2022	03/07/2022	\$500,001 - \$1,000,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike Price \$160; Expires 9/16/2022					
JT	Microsoft Corporation (MSFT) [OP]	P	02/10/2022	03/07/2022	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike Price \$150; Expires 9/16/2022					
JT	Microsoft Corporation (MSFT) [OP]	P	02/10/2022	03/07/2022	\$500,001 - \$1,000,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike Price \$145; Expires 9/16/2022					
JT	Monster Beverage Corporation (MNST) [ST]	S (partial)	02/14/2022	03/07/2022	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	PayPal Holdings, Inc. (PYPL) [ST]	S	02/02/2022	03/07/2022	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

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	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Rockwell Automation, Inc. (ROK) [ST]	S (partial)	02/03/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Seagen Inc. (SGEN) [ST]	S (partial)	02/18/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Skyline Champion Corporation (SKY) [ST]	S (partial)	02/14/2022	03/07/2022	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Snap Inc. Class A (SNAP) [ST]	S	02/02/2022	03/07/2022	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	SVB Financial Group (SIVB) [ST]	P	02/09/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Terex Corporation (TEX) [ST]	P	02/15/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Tesla, Inc. (TSLA) [ST]	P	02/07/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Texas Instruments Incorporated (TXN) [ST]	S (partial)	02/23/2022	03/07/2022	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	UFP Industries, Inc. (UFPI) [ST]	S (partial)	02/14/2022	03/07/2022	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					

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JT	United Parcel Service, Inc. (UPS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/18/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	United Parcel Service, Inc. (UPS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/02/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Verisk Analytics, Inc. (VRSK) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/04/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Verizon Communications Inc. (VZ) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/28/2022	03/07/2022	\$1,001 - \$15,000	<input type="checkbox"/>

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## ASSET CLASS DETAILS

- o Morgan Stanley - Portfolio Management Active Assets Account (Owner: JT)  
LOCATION: US
- o Morgan Stanley - Select UMA Account # 1 (Owner: JT)  
LOCATION: US

## INITIAL PUBLIC OFFERINGS

Yes  No

## CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Periodic Transaction Report are true, complete, and correct to the best of my knowledge and belief. Further, I CERTIFY that I have disclosed all transactions as required by the STOCK Act.

**Digitally Signed:** Hon. Josh Gottheimer , 03/18/2022