



PERIODIC TRANSACTION REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 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		Abbott Laboratories Common Stock (ABT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/13/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Alibaba Group Holding Limited American Depository Shares each representing eight Ordinary share (BABA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/12/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Ambev S.A. American Depository Shares (ABEV) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	02/07/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Ambev S.A. American Depository Shares (ABEV) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/06/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Apple Inc. - Common Stock (AAPL) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/03/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Apple Inc. - Common Stock (AAPL) [ST] FILING STATUS: New	S (partial)	02/24/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Apple Inc. - Common Stock (AAPL) [ST]	S (partial)	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	S (partial)	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Blackstone Inc. Common Stock (BX) [ST]	S (partial)	02/27/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Blackstone Inc. Common Stock (BX) [ST]	S (partial)	02/26/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Block, Inc. Class A Common Stock, (XYZ) [ST]	S	02/27/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Block, Inc. Class A Common Stock, (XYZ) [ST]	P	02/03/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Broadcom Inc. - Common Stock (AVGO) [ST]	P	02/06/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Charles Schwab Corporation (SCHW) [ST]	S (partial)	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Cisco Systems, Inc. - Common Stock (CSCO) [ST]	S (partial)	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New					

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		D.R. Horton, Inc. Common Stock (DHI) [ST]	S (partial)	02/13/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		DASSAULT SYSTEMES SA ADR (DASTY) [ST]	S (partial)	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		DISCO CORP UNSP /ADR (DSCSY) [ST]	P	02/10/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		DISCO CORP UNSP /ADR (DSCSY) [ST]	P	02/07/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		EEN ENERGY HLDGS UNSP/ADR (XNGSY) [ST]	S (partial)	02/07/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		EEN ENERGY HLDGS UNSP/ADR (XNGSY) [ST]	S (partial)	02/10/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Eli Lilly and Company Common Stock (LLY) [ST]	S (partial)	02/19/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Fiserv, Inc. Common Stock (FI) [ST]	P	02/26/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Fiserv, Inc. Common Stock (FI) [ST]	P	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					

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JT	Goldman Sachs Group, Inc. (GS) [ST]	S (partial)	02/28/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Home Depot, Inc. (HD) [ST]	S (partial)	02/24/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	ICF International, Inc. - Common Stock (ICFI) [ST]	S	02/19/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Infineon Technologies AG (IFNNY) [ST]	S (partial)	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	KKR & Co. Inc. Common Stock (KKR) [ST]	S (partial)	02/27/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	KKR & Co. Inc. Common Stock (KKR) [ST]	S (partial)	02/26/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Microsoft Corporation - Common Stock (MSFT) [ST]	S (partial)	02/24/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Microsoft Corporation - Common Stock (MSFT) [ST]	S (partial)	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Microsoft Corporation - Common Stock (MSFT) [OP]	P	02/14/2025	03/05/2025	\$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 \$240; Expires 12/19/2025 COMMENTS: Ref: 045S899L					

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT	Microsoft Corporation - Common Stock (MSFT) [OP] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$240; Expires 12/19/2025 COMMENTS: Ref: 045S891L	P	02/14/2025	03/05/2025	\$500,001 - \$1,000,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [OP] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$235; Expires 1/16/2026	P	02/14/2025	03/05/2025	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [OP] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$230; Expires 1/16/2026	P	02/14/2025	03/05/2025	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [OP] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$325; Expires 6/18/2026 COMMENTS: Ref: 045S893L	S	02/14/2025	03/05/2025	\$500,001 - \$1,000,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [OP] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$325; Expires 6/18/2026 COMMENTS: Ref: 045S890L	S	02/14/2025	03/05/2025	\$250,001 - \$500,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [OP] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$320; Expires 6/18/2026	S	02/14/2025	03/05/2025	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account	S (partial)	02/14/2025	03/05/2025	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT	Nintendo Co Ltd ADR (NTDOY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Paragon 28, Inc. Common Stock (FNA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	02/27/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Paychex, Inc. - Common Stock (PAYX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	PayPal Holdings, Inc. - Common Stock (PYPL) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/13/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	PayPal Holdings, Inc. - Common Stock (PYPL) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/06/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/12/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/03/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Snowflake Inc. Class A Common Stock (SNOW) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Spotify Technology S.A. Ordinary Shares (SPOT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/21/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Starbucks Corporation - Common	P	02/03/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		Stock (SBUX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					<input type="checkbox"/>
JT		Tesla, Inc. - Common Stock (TSLA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/05/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Tesla, Inc. - Common Stock (TSLA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/14/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Tesla, Inc. - Common Stock (TSLA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/13/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Transdigm Group Incorporated Common Stock (TDG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/04/2025	03/05/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Twilio Inc. Class A Common Stock (TWLO) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/06/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Union Pacific Corporation Common Stock (UNP) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/03/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Vertiv Holdings, LLC Class A Common Stock (VRT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	02/25/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Visa Inc. (V) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/28/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Visa Inc. (V) [ST]	P	02/13/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Walmart Inc. Common Stock (WMT) [ST]	P	02/03/2025	03/05/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					

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

INVESTMENT VEHICLE 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 , 03/06/2025