



Filing ID #20030860

PERIODIC TRANSACTION REPORT

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

FILER INFORMATION

Name: Hon. Jonathan Jackson**Status:** Member**State/District:** IL01

TRANSACTIONS

| ID | Owner | Asset | Transaction Type | Date | Notification Date | Amount | Cap. Gains > \$200? |
|----|-------|--|------------------|------------|-------------------|--------------------|--------------------------|
| | SP | Amazon.com, Inc. - Common Stock (AMZN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/03/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Amazon.com, Inc. - Common Stock (AMZN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/24/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Amazon.com, Inc. - Common Stock (AMZN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 04/23/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Arm Holdings plc - American Depositary Shares (ARM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 07/17/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Church & Dwight Company, Inc. Common Stock (CHD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/03/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Church & Dwight Company, Inc. Common Stock (CHD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/24/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |

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| | SP | Church & Dwight Company, Inc. Common Stock (CHD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | S | 05/05/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Eli Lilly and Company Common Stock (LLY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | S | 05/21/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Eli Lilly and Company Common Stock (LLY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 04/23/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Fomento Economico Mexicano S.A.B. de C.V. Common Stock (FMX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 05/21/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Fomento Economico Mexicano S.A.B. de C.V. Common Stock (FMX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | S | 07/17/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Goldman Sachs Group, Inc. (GS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | S | 04/07/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Goldman Sachs Group, Inc. (GS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/03/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Goldman Sachs Group, Inc. (GS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/24/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | International Business Machines | P | 05/21/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |

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| | | Corporation Common Stock (IBM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | | | | | <input type="checkbox"/> |
| SP | | KKR & Co. Inc. Common Stock (KKR) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/03/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| SP | | KKR & Co. Inc. Common Stock (KKR) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/24/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| SP | | KKR & Co. Inc. Common Stock (KKR) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | S | 04/04/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| SP | | McKesson Corporation Common Stock (MCK) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/03/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| SP | | McKesson Corporation Common Stock (MCK) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/24/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| SP | | McKesson Corporation Common Stock (MCK) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 04/23/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| SP | | Meta Platforms, Inc. - Class A Common Stock (META) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/03/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| SP | | Meta Platforms, Inc. - Class A Common Stock (META) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/24/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |

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| | SP | Palo Alto Networks, Inc. (PANW) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/03/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Palo Alto Networks, Inc. (PANW) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | S | 03/17/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | T-Mobile US, Inc. (TMUS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/03/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | T-Mobile US, Inc. (TMUS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/24/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | T-Mobile US, Inc. (TMUS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 04/23/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Williams Companies, Inc. (WMB) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/17/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Williams Companies, Inc. (WMB) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | P | 03/24/2025 | 08/03/2025 | \$1,001 - \$15,000 | <input type="checkbox"/> |
| | SP | Williams Companies, Inc. (WMB) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA | S (partial) | 04/23/2025 | 08/03/2025 | \$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>.

INVESTMENT VEHICLE DETAILS

- Morgan Stanley - Rollover IRA (Owner: SP)

COMMENTS

Filer’s spouse opened a new Rollover IRA account with Morgan Stanley in March 2025. The Rollover IRA account is managed by an independent broker; neither the filer nor the filer’s spouse direct transactions within the account. Morgan Stanley did not forward information about the Rollover IRA account transactions to the filer’s financial disclosure preparer until August 2025. Going forward, reportable transactions within this account will be reported on a timely basis.

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. Jonathan Jackson , 08/25/2025