



Filing ID #20034113

# PERIODIC TRANSACTION REPORT

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## FILER INFORMATION

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

## TRANSACTIONS

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		Amazon.com, Inc. - Common Stock (AMZN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley IRA	P	02/05/2026	03/03/2026	\$1,001 - \$15,000	<input type="checkbox"/>
SP		Amazon.com, Inc. - Common Stock (AMZN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA	S	02/11/2026	03/03/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		Broadcom Corporation - Class A (BRCM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley IRA	S	02/04/2026	03/03/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		Citigroup, Inc. Common Stock (C) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley IRA	P	02/04/2026	03/03/2026	\$1,001 - \$15,000	<input type="checkbox"/>
SP		Citigroup, Inc. Common Stock (C) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA	P	02/11/2026	03/04/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Citigroup, Inc. Common Stock (C) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley Trust Account	P	02/05/2026	03/03/2026	\$50,001 - \$100,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT		International Business Machines Corporation Common Stock (IBM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley Trust Account	S	02/17/2026	03/03/2026	\$50,001 - \$100,000	<input type="checkbox"/>
		International Business Machines Corporation Common Stock (IBM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley IRA	S	02/17/2026	03/03/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Palo Alto Networks, Inc. (PANW) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley Trust Account	S	02/05/2026	03/03/2026	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
		Shopify Inc. - Class A Subordinate Voting Shares (SHOP) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley IRA	S	02/03/2026	03/03/2026	\$1,001 - \$15,000	<input type="checkbox"/>
SP		Tenet Healthcare Corporation Common Stock (THC) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA	S (partial)	02/11/2026	03/03/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		The Bank of New York Mellon Corporation Common Stock (BK) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley IRA	P	02/17/2026	03/03/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT		The Bank of New York Mellon Corporation Common Stock (BK) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley Trust Account	P	02/17/2026	03/03/2026	\$50,001 - \$100,000	<input type="checkbox"/>
SP		Welltower Inc. Common Stock (WELL) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Rollover IRA	P	02/11/2026	03/03/2026	\$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)
- Morgan Stanley IRA
- Morgan Stanley Trust Account (Owner: JT)  
DESCRIPTION: 083057

## **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 , 03/12/2026