



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Philip Jerome Andrew  
**Status:** Congressional Candidate  
**State/District:** IL09

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 11/02/2025  
**Period Covered:** 01/01/2024– 10/05/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chase Checking Accounts [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Brokerage Checking and Savings Accounts [BA]		\$250,001 - \$500,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity 2 MRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	\$15,001 - \$50,000	None		
Fidelity 2 MRA ⇒ Block, Inc. Class A Common Stock, (XYZ) [ST]	SP	\$1,001 - \$15,000	None		
Fidelity 2 MRA ⇒ Cash held in Fidelity money market [BA]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Fidelity 2 MRA ⇒ Enterprise Products Partners L.P. Common Stock (EPD) [ST]	SP	\$50,001 - \$100,000	None		
Fidelity 2 MRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity 2 MRA ⇒ ONEOK, Inc. Common Stock (OKE) [ST]	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Fidelity 2 MRA ⇒ Vanguard Growth ETF (VUG) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity MRA ⇒ Arhaus, Inc. - Class A Common Stock (ARHS) [ST]	SP	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Fidelity MRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	SP	\$500,001 - \$1,000,000	None		
Fidelity MRA ⇒ Cash held in Fidelity money market [BA]	SP	\$100,001 - \$250,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Fidelity MRA ⇒ Fidelity U.S. Large Cap Index Strategy [HE]	SP	\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Fidelity MRA ⇒ MICROSOFT CORP NOTE [CS]  DESCRIPTION: Microsoft Corp Note	SP	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity MRA ⇒ Vanguard Horizon Fund, Vanguard Capital Opportunity Fund (VHCOX) [MF]	SP	\$100,001 - \$250,000	Dividends	None	\$5,001 - \$15,000
Fidelity MRA ⇒ Vanguard Specialized Portfolios Health Care Fund (VGHCX) [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$15,001 - \$50,000
Fidelity MRA ⇒ XPLR Infrastructure, LP Common Units representing limited partner interests (XIFR) [ST]	SP	\$1,001 - \$15,000	Nondividend Distribution	None	\$2,501 - \$5,000
Schwab MRA IRA ⇒ Airbnb, Inc. - Class A Common Stock (ABNB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA IRA ⇒ Airbnb, Inc. - Class A Common Stock (ABNB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA IRA ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab MRA IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		
Schwab MRA IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		
Schwab MRA IRA ⇒ Cash and Money Market Holdings [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA IRA ⇒ Colgate-Palmolive Company Common Stock (CL) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA IRA ⇒ CrowdStrike Holdings, Inc. - Class A Common Stock (CRWD) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		
Schwab MRA IRA ⇒ GE Aerospace Common Stock (GE) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA IRA ⇒ GE HealthCare Technologies Inc. - Common Stock (GEHC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA IRA ⇒ GE Vernova Inc. Common Stock (GEV) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA IRA ⇒ Intel Corporation - Common Stock (INTC) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA IRA ⇒ Intuit Inc. - Common Stock (INTU) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA IRA ⇒ iShares Gold Trust Micro Shares (IAUM) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA IRA ⇒ iShares U.S. Insurance ETF (IAK) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab MRA IRA ⇒ Nike, Inc. Common Stock (NKE) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Schwab MRA IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		
Schwab MRA IRA ⇒ ProShares Ultra Health Care (RXL) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA IRA ⇒ ProShares Ultra S&P500 (SSO) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Schwab MRA IRA ⇒ ProShares UltraPro Dow30 (UDOW) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Schwab MRA IRA ⇒ Spotify Technology S.A. Ordinary Shares (SPOT) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA IRA ⇒ Sysco Corporation Common Stock (SYN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA IRA ⇒ TENCENT HLDGS UNSP/ADR (TCEHY) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA IRA ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA IRA ⇒ Vanguard Total World Stock Index ETF (VT) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA IRA ⇒ Walmart Inc. Common Stock (WMT) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		
Schwab MRA Roth IRA ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		
Schwab MRA Roth IRA ⇒ Garmin Ltd. Common Stock (GRMN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA Roth IRA ⇒ Schwab Cash and Money Market Holdings [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Schwab MRA Roth IRA ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA SEPA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Schwab MRA SEPA ⇒ Bank of America Corporation Common Stock (BAC) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA SEPA ⇒ Blackstone Inc. Common Stock (BX) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Schwab MRA SEPA ⇒ Cash and Money Market Holdings [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA SEPA ⇒ GE HealthCare Technologies Inc. - Common Stock (GEHC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA SEPA ⇒ GE Vernova Inc. Common Stock (GEV) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA SEPA ⇒ General Electric Company Common Stock When-Issued (GE.V) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA SEPA ⇒ Mastercard Incorporated Common Stock (MA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA SEPA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA SEPA ⇒ Shopify Inc. - Class A Subordinate Voting Shares (SHOP) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab MRA SEPA ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab MRA SEPA ⇒ Zoom Communications, Inc. - Class A Common Stock (ZM) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Schwab PA IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Invesco BuyBack Achievers ETF (PKW) [EF]					
Schwab PA IRA ⇒ Lucid Group, Inc. - Common Stock (LCID) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab PA IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab PA IRA ⇒ Schwab Cash and Money Market Holdings [BA]		\$1 - \$1,000	Tax-Deferred		
Schwab PA IRA ⇒ Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab PA Roth IRA ⇒ Airbnb, Inc. - Class A Common Stock (ABNB) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Schwab PA Roth IRA ⇒ Confluent, Inc. - Class A Common Stock (CFLT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab PA SEPA ⇒ Adobe Inc. - Common Stock (ADBE) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Schwab PA SEPA ⇒ CrowdStrike Holdings, Inc. - Class A Common Stock (CRWD) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Schwab PA SEPA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Schwab PA SEPA ⇒ Portillo's Inc. - Class A Common Stock (PTLO) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab PA SEPA ⇒ Shopify Inc. - Class A Subordinate Voting Shares (SHOP) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Schwab PA SEPA ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab PA SEPA ⇒ Visa Inc. (V) [ST]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab PA SEPA ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard EA 529 ⇒ Vanguard Developed Markets Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	Tax-Deferred		
Vanguard EA 529 ⇒ Vanguard Growth Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	Tax-Deferred		
Vanguard EA 529 ⇒ Vanguard Mid-Cap Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	Tax-Deferred		
Vanguard EA 529 ⇒ Vanguard Small-Cap Stock Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	Tax-Deferred		
Vanguard EA 529 ⇒ Vanguard Value Stock Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	Tax-Deferred		
Vanguard GA 529 ⇒ Vanguard Developed Markets Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	Tax-Deferred		
Vanguard GA 529 ⇒ Vanguard Growth Stock Index Portfolio [5F]  LOCATION: NY		\$15,001 - \$50,000	Tax-Deferred		
Vanguard GA 529 ⇒ Vanguard Mid-Cap Stock Index Portfolio [5F]  LOCATION: NY		\$15,001 - \$50,000	Tax-Deferred		
Vanguard GA 529 ⇒ Vanguard Small-Cap Stock Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	Tax-Deferred		
Vanguard GA 529 ⇒ Vanguard Value Stock Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard LA 529 ⇒ Developed Markets Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	Tax-Deferred		
Vanguard LA 529 ⇒ Vanguard Growth Stock Index Portfolio [5F]  LOCATION: NY		\$15,001 - \$50,000	Tax-Deferred		
Vanguard LA 529 ⇒ Vanguard Mid-Cap Stock Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	Tax-Deferred		
Vanguard LA 529 ⇒ Vanguard Small-Cap Stock Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	Tax-Deferred		
Vanguard LA 529 ⇒ Vanguard Value Stock Index Portfolio [5F]  LOCATION: NY		\$1,001 - \$15,000	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
PAX GROUP LLC	gross income derived from business	\$146,340.22	\$483,376.32
Village of Kenilworth	salary	\$1,620.14	\$1,243.15
PAX LAW LLC	spouse income from business	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Officer/Proprietor (Manager/Member)	PAX GROUP LLC



SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Lake Forest Center for Leadership (Lake Forest, IL, US)	Consulting services
Loyola Academy (Wilmette, IL, US)	Consulting services
Felician Services, Inc. (Chicago, IL, US)	Consulting services
Chicago Botanic Garden (Glencoe, IL, US)	Consulting services
Advocate Aurora Health, Inc. (Downers Grove, IL, US)	Consulting services
Office of the Attorney General, State of Washington (Tacoma, WA, US)	Expert witness services
City of Chicago Law Department (Chicago, IL, US)	Expert witness services
University of Arizona (Tucson, AZ, US)	Consulting services
City of Highland Park (Highland Park, IL, US)	Expert witness services
Office of the Attorney General, State of Illinois (Chicago, IL, US)	Expert witness services
certain confidential clients are not reported (chicago, IL, US)	consulting services subject to confidentiality

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>Schwab PA SEPA</li><li>Schwab PA Roth IRA</li><li>Schwab MRA IRA (Owner: SP)</li><li>Schwab MRA SEPA (Owner: SP)</li><li>Schwab MRA Roth IRA (Owner: SP)</li><li>Schwab PA IRA</li><li>Vanguard EA 529 LOCATION: NY</li><li>Vanguard LA 529 LOCATION: NY</li><li>Vanguard GA 529 LOCATION: NY</li><li>Fidelity MRA (Owner: SP)</li></ul>
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- Fidelity 2 MRA (Owner: SP)

## 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:** Philip Jerome Andrew , 11/02/2025