



Filing ID #10067552

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Michael Roth
Status: Congressional Candidate
State/District: NJ07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 08/12/2025
Period Covered: 01/01/2024– 07/15/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Mass Mutual Whole Life Legacy [WU]		\$100,001 - \$250,000	Tax-Deferred		
Coinbase ⇒ Coinbase [CT]		\$15,001 - \$50,000	None		
Fidelity 4004 ⇒ Blackrock Debt Strategies Fund, Inc. Common Stock (DSU) [ST]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
Fidelity 4004 ⇒ BlackRock Enhanced Large Cap Core Fund, Inc. Common Stock (CII) [ST]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Fidelity 4004 ⇒ Eaton Vance Corporation Eaton Vance Tax-Managed Global Buy-Write Opportunites Fund Common Shares of (ETW) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Fidelity 4004 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity 4004 ⇒ Money Market [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity 4004 ⇒ Nuveen NASDAQ 100 Dynamic Overwrite Fund - Closed End Fund (QQQX) [ST]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Fidelity 4004 ⇒ Nuveen S&P 500 Buy-Write Income Fund Common Shares of Beneficial Interest (BXMV) [ST]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$2,501 - \$5,000
Fidelity 4004 ⇒ Valley National Bancorp (VLY) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Fidelity 4004 ⇒ Virtus Convertible & Income Fund Common Shares of Beneficial Interest (NCV) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Fidelity 8913 ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$15,001 - \$50,000	None		
Fidelity 8913 ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity 8913 ⇒ Boeing Company (BA) [ST]		\$1,001 - \$15,000	None		
Fidelity 8913 ⇒ Direxion Daily S&P 500 Bull 3X Shares (SPXL) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Fidelity 8913 ⇒ International Business Machines Corporation Common Stock (IBM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity 8913 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1 - \$200
Fidelity 8913 ⇒ Invesco Variable Rate Preferred ETF (VRP) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	None
Fidelity 8913 ⇒ IQVIA Holdings, Inc. Common Stock (IQV) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity 8913 ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity 8913 ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity 8913 ⇒ iShares Russell 2000 ETF (IWM) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity 8913 ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Fidelity 8913 ⇒ Kinsale Capital Group, Inc. (KNSL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Fidelity 8913 ⇒ Kyndryl Holdings, Inc. Common Stock (KD) [ST]		\$1 - \$1,000	None		
Fidelity 8913 ⇒ LegalZoom.com, Inc. - Common Stock (LZ) [ST]		\$1,001 - \$15,000	None		
Fidelity 8913 ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity 8913 ⇒ Micron Technology, Inc. - Common Stock (MU) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity 8913 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Fidelity 8913 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity 8913 ⇒ ProShares Short FTSE China 50 (YXI) [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity 8913 ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity 8913 ⇒ SPDR Series Trust SPDR S&P Biotech ETF (XBI) [EF]		\$1,001 - \$15,000	None		
Fidelity 8913 ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Tesla, Inc. - Common Stock (TSLA) [ST]					
Fidelity 8913 ⇒ Toast, Inc. Class A Common Stock (TOST) [ST]		\$1,001 - \$15,000	None		
Fidelity 8913 ⇒ Upwork Inc. - Common Stock (UPWK) [ST]		\$1,001 - \$15,000	None		
Fidelity 8913 ⇒ US Treasury 3 Month Bill ETF (TBIL) [EF]		\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Fidelity 8913 ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Fidelity 8913 ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Fidelity 8913 ⇒ Vanguard FTSEEuropean ETF (VGK) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity 8913 ⇒ Vanguard Real Estate ETF (VNQ) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity 8913 ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Fidelity 8913 ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
IBM ⇒ Blended Fund 2055 [OT]					
DESCRIPTION: Blended Fund Investment for target date 2055 Retirement					
JustWorks Retirment Savings Plan ⇒ Assorted Funds [OT]					
DESCRIPTION: 60% Large Cap Funds 20% Bond Funds 10% Internatinal Funds 10% Specialty Funds					
Marcus ⇒ Goldman [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
Next Street Financial Holdings Inc ⇒ Next Street Financial Holdings Inc [PS]					
DESCRIPTION: Shares of employee ownership					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
RJ C075 ⇒ Airbnb, Inc. - Class A Common Stock (ABNB) [ST]		\$1,001 - \$15,000	None		
RJ C075 ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
RJ C075 ⇒ Blackstone Inc. Common Stock (BX) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
RJ C075 ⇒ Boston Scientific Corporation Common Stock (BSX) [ST]		\$1,001 - \$15,000	None		
RJ C075 ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
RJ C075 ⇒ Copart, Inc. - Common Stock (CPRT) [ST]		\$1,001 - \$15,000	None		
RJ C075 ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
RJ C075 ⇒ Fair Isaac Corporation Common Stock (FICO) [ST]		\$1,001 - \$15,000	None		
RJ C075 ⇒ Intuit Inc. - Common Stock (INTU) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
RJ C075 ⇒ Intuitive Surgical, Inc. - Common Stock (ISRG) [ST]		\$1,001 - \$15,000	None		
RJ C075 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
RJ C075 ⇒ MSCI Inc. Common Stock (MSCI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
RJ C075 ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]		\$15,001 - \$50,000	None		
RJ C075 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
RJ C075 ⇒ S&P Global Inc. Common Stock (SPGI) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
RJ C075 ⇒ ServiceNow, Inc. Common Stock (NOW) [ST]		\$15,001 - \$50,000	None		
RJ C075 ⇒ Shopify Inc. - Class A Subordinate Voting Shares (SHOP) [ST]		\$1,001 - \$15,000	None		
RJ C075 ⇒ Spotify Technology S.A. Ordinary Shares (SPOT) [ST]		\$1,001 - \$15,000	None		
RJ C075 ⇒ Synopsys, Inc. - Common Stock (SNPS) [ST]		\$15,001 - \$50,000	None		
RJ C075 ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]		\$1,001 - \$15,000	None		
RJ C075 ⇒ Transdigm Group Incorporated Common Stock (TDG) [ST]		\$1,001 - \$15,000	None		
RJ C075 ⇒ Uber Technologies, Inc. Common Stock (UBER) [ST]		\$1,001 - \$15,000	None		
RJ C075 ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]		\$1,001 - \$15,000	None		
RJ C075 ⇒ Visa Inc. (V) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
RJ R355 ⇒ American Express Company Common Stock (AXP) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
RJ R355 ⇒ Coca-Cola Company (KO) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
RJ R355 ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
RJ R355 ⇒ McKesson Corporation Common Stock (MCK) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
RJ R355 ⇒ National Fuel Gas Company Common Stock (NFG) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
RJ R355 ⇒ Norfolk Southern Corporation Common Stock (NSC) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
RJ Y149 ⇒ Allspring Emerging Markets Equity Fund Institutional Class (EMGNX) [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	None
RJ Y149 ⇒ Allspring Premier Large Company Growth Fund Insti Class (EKJYX) [MF]		\$15,001 - \$50,000	None		
RJ Y149 ⇒ Allspring Special Global Small Cap - Class I (EKGIX) [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
RJ Y149 ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
RJ Y149 ⇒ Baron Focused Growth Fund Inst Shs (BFGIX) [MF]		\$15,001 - \$50,000	None		
RJ Y149 ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$15,001 - \$50,000	None		
RJ Y149 ⇒ Calamos Timpani Small Cap Growth Fund Class I (CTSIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
RJ Y149 ⇒ Cheniere Energy, Inc. Common Stock (LNG) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	None
RJ Y149 ⇒ Coinbase Global, Inc. - Class A Common Stock (COIN) [ST]		\$1,001 - \$15,000	None		
RJ Y149 ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
RJ Y149 ⇒ FullerThaler Behavioral Mid-Cap Value Fund Institutional Shares (FTVSX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
RJ Y149 ⇒ FullerThaler Behavioral Small-Cap Growth Fund Institutional Shares (FTXSX) [MF]		\$15,001 - \$50,000	None		
RJ Y149 ⇒ GQG Partners Global Quality Equity Fund Institutional Shares (GQRIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
RJ Y149 ⇒ iShares U.S. Home Construction ETF (ITB) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	None
RJ Y149 ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
RJ Y149 ⇒ JPMorgan Hedged Equity Fund I Class (JHEQX) [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	None
RJ Y149 ⇒ Macquarie Science and Technology Fund Institutional (ISTIX) [MF]		\$15,001 - \$50,000	None		
RJ Y149 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
RJ Y149 ⇒ Olstein All Cap Value Fund Adviser Class (OFAFX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1,001 - \$2,500
RJ Y149 ⇒ Texas Pacific Land Corporation Common Stock (TPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
RJ Y149 ⇒ Vertiv Holdings, LLC Class A Common Stock (VRT) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200

* 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
Next Street	Salary	\$97,095.62	\$207,936.41

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Next Street
Board Member	Economic Opportunity Coalition

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2025	Next Street and Michael Roth	Consulting ending December 2025

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<div><ul style="list-style-type: none">RJ C075Fidelity 4004RJ Y149RJ R355CoinbaseFidelity 8913MarcusIBMJustWorks Retirement Savings PlanNext Street Financial Holdings Inc LOCATION: US</div>
--

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: Michael Roth , 08/12/2025