



Filing ID #10070259

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Jeff Wilson  
**Status:** Congressional Candidate  
**State/District:** IL13

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 05/27/2025  
**Period Covered:** 01/01/2024– 04/15/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise Sweep [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Bank Champaign [BA]		\$1,001 - \$15,000	Interest	None	None
Busey Bank [BA]	JT	\$50,001 - \$100,000	Interest	None	\$1 - \$200
Constellation Retiree Group Life Insurance [OT]		\$1,001 - \$15,000	Group Policy	None	None
DESCRIPTION: Not an individual policy. Pooled collection. Pays out upon proof of death. Met Life targeted to be the carrier via Constellation.					
JL Wilson-Whitfield LLC [RP]		\$500,001 - \$1,000,000	Land lease for cattle	None	None
LOCATION: Coarsegold / Madera, CA, US DESCRIPTION: Expenses exceed income.					
MS E*Trade Sweep [BA]		\$1 - \$1,000	Capital Gains	None	None
Schawb #1 Sweep [BA]		\$1 - \$1,000	Tax-Deferred		
Schawb #2 Sweep [BA]	SP	\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schawb #3 Sweep [BA]	JT	\$1 - \$1,000	Tax-Deferred		
Transamerica Retirement Solutions [FN]		Undetermined	Annuity	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: This is a life annuity base on the life of the recipient and spouse that functions as a pension. Hence, no face value.					
USAA Subscriber Account [OT]		\$1,001 - \$15,000	Subscriber Special	None	None
DESCRIPTION: USAA Subscriber Account. Non accessible until closure of (Home/Auto/Property) insurance account. Or death, which at that time transfers to spouse as cash or held in USAA account in her name.					
Ameriprise #1 ⇒ Columbia Acorn Trust, Thermostat Fund Class C (CTFDX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Ameriprise #1 ⇒ Columbia Dividend Opportunity Fund Class C (ACUIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise #1 ⇒ Columbia Seligman Technology & Information Fd Inc Cl C (SCICX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise #2 ⇒ Fidelity Advisor Growth Opportunities Fund: Class I (FAGCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise #2 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Ameriprise #2 ⇒ iShares Semiconductor ETF (SOXX) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Ameriprise #2 ⇒ iShares U.S. Medical Devices ETF (IHI) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise #2 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Ameriprise #2 ⇒ SPDR S&P Dividend ETF (SDY) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Ameriprise #2 ⇒ T. Rowe Price Capital Appreciation Fund (PRWCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise #2 ⇒ Walmart Inc. Common Stock (WMT) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Constellation Employee 401K ⇒ Customized Blackrock U.S. Equity Index [OT]		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Special customized fund for Constellation Employees.					
Constellation Employee 401K ⇒ Customized US Equity Fund [OT]		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: This fund is a customized fund for Constellation Employees					
MS E*Trade ⇒ Centrus Energy Corp. Class A Common Stock (LEU) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Schwab #2 ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Schwab #1 ⇒ APA Corporation - Common Stock (APA) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ Bank of America Corporation Common Stock (BAC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ Barrick Mining Corporation Common Shares (B) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ Boeing Company (BA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ BWX Technologies, Inc. Common Stock (BWXT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ Centrus Energy Corp. Class A Common Stock (LEU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab #1 ⇒ Coinbase Global, Inc. - Class A Common Stock (COIN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ Elbit Systems Ltd. - Ordinary Shares (ESLT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Schwab #1 ⇒ Ford Motor Company Common Stock (F) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ GE Aerospace Common Stock (GE) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ GE HealthCare Technologies Inc. - Common Stock (GEHC) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ Home Depot, Inc. (HD) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Schwab #1 ⇒ INmune Bio Inc. - Common stock (INMB) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ InvenTrust Properties Corp. Common Stock (IVT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab #1 ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$250,001 - \$500,000	Tax-Deferred		
Schwab #1 ⇒ Oracle Corporation Common Stock (ORCL) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab #1 ⇒ Peabody Energy Corporation Common Stock (BTU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ Smith & Wesson Brands, Inc. - Common Stock (SWBI) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ Sturm, Ruger & Company, Inc. Common Stock (RGR) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ Teladoc Health, Inc. Common Stock (TDOC) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ Trump Media & Technology Group Corp. - Common Stock (DJT) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab #1 ⇒ VALE S.A. American Depositary Shares Each Representing one common share (VALE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ Vanguard Information Tech ETF (VGT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab #1 ⇒ Walmart Inc. Common Stock (WMT) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Schwab #3 ⇒ SPDR S&P Software & Services ETF (XSW) [EF]	JT	\$1,001 - \$15,000	Capital Gains	None	None
DESCRIPTION: No income taken					

\* 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
Sargent & Lundy L.L.C.	Employment	\$237.00	\$32,968.00
Transamerica Life Insurance Company	Fixed Annuity	\$862.00	\$2,069.00
Champaign County	County Board Member	\$1,020.00	\$2,055.00

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Taylor Realty, Inc.	Spouse - Realtor	\$37,227.00	\$17,379.00
The Northern Trust Company	Distribution	\$ .00	\$65,000.00
Charles Schwab & Co., Inc.	Distribution	\$139,000.00	\$30,000.00
Ameriprise Trust Company	Spouse - Distribution	\$ .00	\$447.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
County Board Member (Compensated)	Champaign County Board
Commissioner	Champaign County Regional Planning Commission
Manager / Member (Not Compensated)	JL Wilson-Whitfield LLC
Manager (Not Compensated)	RL Wilson Realty LLC

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>◦ Constellation Employee 401K DESCRIPTION: Constellation Employee 401K, employee savings plan by NWPS.</li><li>◦ Schwab #1</li><li>◦ Schwab #3 (Owner: JT)</li><li>◦ Ameriprise #2 (Owner: SP)</li><li>◦ Ameriprise #1 (Owner: SP) DESCRIPTION: This is an SRA account (Qualified)</li><li>◦ MS E*Trade</li><li>◦ Schawb #2 (Owner: SP)</li></ul>
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## 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:** Jeff Wilson , 05/27/2025