



Filing ID #10072757

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Dr. Jeromie Patrick Whalen  
**Status:** Congressional Candidate  
**State/District:** MA01

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 11/17/2025  
**Period Covered:** 01/01/2024– 07/28/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Florence Bank - Checkin 01 [BA]		\$1 - \$1,000	None		
DESCRIPTION: Florence Bank Individual Checking 01					
Florence Bank Checking 02 [BA]		\$1 - \$1,000	None		
DESCRIPTION: Florence Bank Checking 02					
Florence Bank Joint [BA]	JT	\$1,001 - \$15,000	None		
DESCRIPTION: Florence Bank Joint					
JPMorgan Chase Checking Account [BA]	SP	\$15,001 - \$50,000	None		
Roth IRA - UBS [OT]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Diversified IRA containing mutual funds, stocks, and bonds. Using 'Other' because no IRA category applies (account not held in cash).					
Stellar Lumens [CT]		\$1,001 - \$15,000	Cryptocurrency	None	None
Traditional IRA - UBS [OT]	SP	\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Diversified IRA containing mutual funds, stocks, and bonds. Using 'Other' because no IRA category applies (account not held in cash)					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Transamerica Whole Life Policy [WU]	SP	\$50,001 - \$100,000	None		
DESCRIPTION: Cash value life insurance policy.					
UBS Brokerage Account [OT]	SP	\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: Diversified UBS brokerage account containing multiple stocks, ETFs, mutual funds, and bonds. Using "Other" because no "Brokerage Account" category was available.					
Vanguard 403b ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAZ) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard 403b ⇒ Vanguard Growth Index Fd Admiral Shs (VIGAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard 403b ⇒ Vanguard Health Care Fund Admiral Shares (VGHAX) [MF]		\$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
Northampton Public Schools	Employment (self)	\$55,829.19	\$78,637.25
COMMENTS: Teacher pay			
TP ICAP Americas Holdings, Inc.	Spouse Salary	N/A	N/A
BGC USA LP	Spouse Bonus (from prior employment)	N/A	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	JPMorgan Chase	February 2022	Primary House Mortgage	\$250,001 - \$500,000

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
SP	JPMorgan Chase	May 2025	Auto Loan	\$15,001 - \$50,000
SP	UBS Financial Services	May 2022	Securities-backed line of credit	\$250,001 - \$500,000
SP	American Express	Jan 2025	Revolving credit card balance	\$15,001 - \$50,000
SP	Citibank	September 2022	Revolving credit card balance	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

<b>Date</b>	<b>Parties To</b>	<b>Terms of Agreement</b>
September 2025	Northampton Public Schools	Year leave of absence.
COMMENTS: Year leave of absence from teaching position.		

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

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- Vanguard 403b  
DESCRIPTION: Vanguard 403b mutual fund retirement account.  
COMMENTS: Held through Northampton Public Schools

## 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:** Dr. Jeromie Patrick Whalen , 11/17/2025