



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 | | |

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| 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 | | |

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| 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 | | |

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| 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 | | |

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| 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 Depository 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

- Constellation Employee 401K
DESCRIPTION: Constellation Employee 401K, employee savings plan by NWPS.
- Schwab #1
- Schwab #3 (Owner: JT)
- Ameriprise #2 (Owner: SP)
- Ameriprise #1 (Owner: SP)
DESCRIPTION: This is an SRA account (Qualified)
- MS E*Trade
- Schawb #2 (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: Jeff Wilson , 05/27/2025