



Filing ID #10072757

FINANCIAL DISCLOSURE REPORT

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

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

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 (VFIAX) [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 COMMENTS: Teacher pay	Employment (self)	\$55,829.19	\$78,637.25
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

Owner	Creditor	Date Incurred	Type	Amount of Liability
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

Date	Parties To	Terms of Agreement
September 2025	Northampton Public Schools	Year leave of absence.
COMMENTS: Year leave of absence form teaching position.		

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">Vanguard 403b DESCRIPTION: Vanguard 403b mutual fund retirement account. COMMENTS: Held through Northampton Public Schools
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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: Dr. Jeromie Patrick Whalen , 11/17/2025