



Filing ID #10067208

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Seth Moulton  
**Status:** Member  
**State/District:** MA06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 05/14/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
"Called to Serve: Learning to Lead in War and Peace," St. Martin's Press [IP] DESCRIPTION: The value of this asset is unascertainable. This is a book contract.		Undetermined	Royalties	None	<input type="checkbox"/>
Dhow Ventures Fund I, LP [HE]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Divergent Technologies, Inc. Series D Preferred Stock [PS] DESCRIPTION: Industrial manufacturing company. Torrance, CA, US.	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
Marblehead Bank account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Oura Health OY Series C Preferred Shares [PS] DESCRIPTION: Health technology company. Oulu, Finland.	JT	\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
Residential property located in Salem, MA [RP] LOCATION: Salem / Essex, MA, US	JT	\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Suckerz, Inc. SAFE Preferred Stock [PS] DESCRIPTION: Food and beverage company. Marina Del Rey, CA, US.	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
USAA accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Daughter's 529 ⇒ MA Portfolio 2036 (Fidelity Index) [5F] LOCATION: MA	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
ETRADE Investment Account ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	JT	\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	JT	\$50,001 - \$100,000	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax-Exempt Bond Fund - Institutional Shares (BTEIX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Lazard Global Listed Infrastructure Ptf Insti Shs (GLIFX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Iris Investment Holdings, LLC ⇒ webAI, Inc. [PS]		\$250,001 - \$500,000	None		<input type="checkbox"/>
DESCRIPTION: Information technology company. Grand Rapids, MI, US. Note that the name of the company was changed from Iris Technology, Inc. to webAI, Inc. in 2024. This asset was previously disclosed under the name Iris Technology, Inc.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Liz: Fidelity Investments IRA#1 ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Emerging Markets Select Fund - Institutional Shares (BAFQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Short-Term Bond Index Fund Admiral Shares (VBIRX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Emerging Markets Select Fund - Institutional Shares (BAFQX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Niece's 529 Account ⇒ MA Portfolio 2033 (Fidelity Fund Port) [5F]  LOCATION: MA		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Emerging Markets Select Fund - Institutional Shares (BAFQX) [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Rollover IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Artisan International Value Fd Insti Shs (APHKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Emerging Markets Select Fund - Institutional Shares (BAFQX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]					
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Iris Investment Holdings, LLC ⇒ webAI, Inc. [PS]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Information technology company. Grand Rapids, MI, US. Note that the name of the company was changed from Iris Technology, Inc. to webAI, Inc. in 2024. This asset was previously disclosed under the name Iris Technology, Inc.					
Thea's 529 ⇒ NH Portfolio 2030 (Fidelity Funds) [5F]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: NH					

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Niece's 529 Account ⇒ American Funds College 2033 Fund Class 529-A [5F]		05/13/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LOCATION: MA					
Niece's 529 Account ⇒ MA Portfolio 2033 (Fidelity Fund Port) [5F]		05/28/2024	P	\$1,001 - \$15,000	
LOCATION: MA					
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	01/02/2024	P	\$15,001 - \$50,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	01/11/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	01/17/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	02/09/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	04/19/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	06/13/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	07/01/2024	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	07/17/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	07/18/2024	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	07/22/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	08/12/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	09/05/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒	JT	09/05/2024	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Government Money Market Fund (SPAXX) [MF]					
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	09/09/2024	P	\$15,001 - \$50,000	
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	09/10/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	12/20/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	12/26/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	12/30/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	12/30/2024	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	JT	07/01/2024	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	JT	07/01/2024	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Global Leaders Fund - Institutional Shares (BAFLX) [MF]	JT	07/01/2024	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]	JT	07/01/2024	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	JT	07/01/2024	P	\$1,001 - \$15,000	
Fidelity Investments Transfer of Death Account ⇒ Lazard Global Listed Infrastructure Ptf Insti Shs (GLIFX) [MF]	JT	07/01/2024	P	\$1,001 - \$15,000	



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax-Exempt Bond Fund - Institutional Shares (BTEIX) [MF]	JT	07/01/2024	P	\$50,001 - \$100,000	
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax-Exempt Bond Fund - Institutional Shares (BTEIX) [MF]	JT	07/18/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax-Exempt Bond Fund - Institutional Shares (BTEIX) [MF]	JT	09/05/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]		03/28/2024	P	\$1,001 - \$15,000	
Seth: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]		03/28/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	03/28/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	03/28/2024	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Emerging Markets Select Fund - Institutional Shares (BAFQX) [MF]	SP	03/28/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Liz: Fidelity Investments IRA#1 ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]	SP	03/28/2024	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#1 ⇒ Vanguard Short-Term Bond Index Fund Admiral Shares (VBIRX) [MF]	SP	03/28/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax-Exempt Bond Fund - Institutional Shares (BTEIX) [MF]	JT	09/09/2024	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Investments Transfer of Death Account ⇒ Brown Advisory Tax-Exempt Bond Fund - Institutional Shares (BTEIX) [MF]	JT	12/30/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	03/28/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	SP	03/28/2024	P	\$1,001 - \$15,000	
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Small-Cap Fundamental Value Fund - Institutional Shares (BAUUX) [MF]	SP	03/28/2024	P	\$1,001 - \$15,000	
Liz: Fidelity Investments Roth IRA ⇒ Brown Advisory Small Cap Growth Fund Inst Shares (BAFSX) [MF]	SP	03/28/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Sustainable Value Fund - Institutional Shares (BASVX) [MF]	SP	03/28/2024	P	\$1,001 - \$15,000	
Liz: Fidelity Investments IRA#2 ⇒ Brown Advisory Emerging Markets Select Fund - Institutional Shares (BAFQX) [MF]	SP	03/28/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

\* 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
Elevate Sports Ventures, Inc.	Spouse salary	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Marblehead Bank	April 2020	Personal residence mortgage	\$1,000,001 - \$5,000,000
JT	Marblehead Bank	February 2022	Home equity line of credit	\$250,001 - \$500,000
JT	Chase Sapphire	December 2024	Credit card	\$15,001 - \$50,000

SP	American Express	December 2024	Credit card	\$15,001 - \$50,000
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SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

Source	Activity	Date	Amount	Charity Name
Trains Magazine	Article	12/01/2022	\$770.00	New American Association of Massachusetts
CHARITY NAME: New American Association of Massachusetts				
COMMENTS: Rep. Moulton authored the article in December 2022 and submitted it to Trains Magazine in 2024. Article was published by Trains Magazine in July 2024 issue, and New American Association of Massachusetts was identified as the charity to receive a donation in lieu of an honoraria. Filer believes donation was made in 2024, but exact date of donation is unknown to filer.				

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>◦ Seth: Fidelity Investments Roth IRA</li><li>◦ Niece's 529 Account LOCATION: MA</li><li>◦ Seth: Fidelity Investments Rollover IRA</li><li>◦ Liz: Fidelity Investments IRA#1 (Owner: SP)</li><li>◦ Fidelity Investments Transfer of Death Account (Owner: JT) LOCATION: US</li><li>◦ Liz: Fidelity Investments Roth IRA (Owner: SP)</li><li>◦ Thea's 529 (Owner: SP) LOCATION: NY</li><li>◦ Daughter's 529 (Owner: SP) LOCATION: MA</li><li>◦ Liz: Fidelity Investments IRA#2 (Owner: SP)</li><li>◦ ETRADE Investment Account (Owner: SP) LOCATION: US</li></ul>
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- Iris Investment Holdings, LLC  
LOCATION: US
- Seth: Fidelity Investments Roth IRA ⇒ Iris Investment Holdings, LLC  
LOCATION: US

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**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:** Hon. Seth Moulton , 05/14/2025