



Filing ID #10070454

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Robert J. Menendez
Status: Member
State/District: NJ08

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 07/14/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Art.sy, Inc. [PS] DESCRIPTION: Private shares in former employer.	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab [BA] DESCRIPTION: Checking & Savings		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Chase Bank [BA] DESCRIPTION: Checking & Savings	SP	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Artsy - 401(K) ⇒ Vanguard Target Retirement 2055 Fund (VFFVX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Charles Schwab Bank [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF] DESCRIPTION: Appreciated over \$1,000	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab - Brokerage ⇒ Schwab Fundamental International Equity ETF (FNDF) [EF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Schwab International Equity ETF (SCHF) [EF] DESCRIPTION: Appreciated over \$1,000	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF] DESCRIPTION: Appreciated over \$1,000	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage ⇒ Vanguard Tax-Exempt Bond ETF (VTEB) [EF]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage #1 ⇒ BlackRock Science and Technology Opportunities Portf Investor A (BGSAX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab - Brokerage #1 ⇒ Nuveen Flagship New Jersey Muni Bd Fd Cl A (NNJAX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab - Brokerage #1 ⇒ Nuveen High Yield Municipal Bd Fd Class A (NHMAX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab - Brokerage #1 ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage #1 ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Charles Schwab Cash [BA]		\$1,001 - \$15,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒		\$1,001 - \$15,000	Capital Gains,	\$1,001 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Invesco RAFI Developed Markets ex-U.S. ETF (PXF) [EF]			Dividends	\$2,500	<input type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Invesco RAFI Developed Markets ex-U.S. Small-Mid ETF (PDN) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental International Equity ETF (FNDF) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental International Small Equity ETF (FNDC) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab International Equity ETF (SCHF) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab U.S. REIT ETF (SCHH) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ SPDR Bloomberg Emerging Markets Local Bond ETF (EBND) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab - Brokerage #2 ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Vanguard Tax-Exempt Bond ETF (VTEB) [EF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Xtrackers International Real Estate ETF (HAUZ) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Charles Schwab Bank [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Schwab 5-10 Year Corporate Bond ETF (SCH1) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental International Equity ETF (FNDF) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental International Small Equity ETF (FNDC) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Schwab Intermediate-Term U.S. Treasury ETF (SCHR) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab - IRA Contributory ⇒ Schwab International Equity ETF (SCHF) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Schwab International Small-Cap Equity ETF (SCHC) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Vanguard Global ex-U.S. Real Estate ETF (VNQI) [EF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Charles Schwab - IRA Contributory ⇒ Vanguard Mortgage-Backed Securities ETF (VMBS) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Goldman Sachs - Brokerage ⇒ FDIC Cash [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Goldman Sachs - Brokerage ⇒ iShares National Muni Bond ETF (MUB) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Goldman Sachs - Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Goldman Sachs - Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Goldman Sachs - Brokerage ⇒ Vanguard Mid-Cap ETF (VO) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Goldman Sachs - Brokerage ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF] DESCRIPTION: Appreciated over \$1,000	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Goldman Sachs - Brokerage ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Goldman Sachs - Brokerage ⇒ Vanguard Small-Cap Value ETF (VBR) [EF] DESCRIPTION: Appreciated over \$1,000	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Goldman Sachs - Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Goldman Sachs - Brokerage ⇒ Vanguard Value ETF (VTV) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Goldman Sachs - IRA ⇒ FDIC Cash [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Goldman Sachs - IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Goldman Sachs - IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Goldman Sachs - IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Goldman Sachs - IRA ⇒ Vanguard Value ETF (VTV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Appreciated over \$1,000					
Lowenstein Sandler - Vanguard - 401(K) ⇒ Columbia Dividend Income Fund Class I3 (CDDYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Information Technology Index Fund Admiral Shs (VITAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Mid-Cap Index Fund Admiral Shares (VIMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Target Retirement 2050 Fund (VFIFX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Peek - 401(K) ⇒ Vanguard Real Estate Index Fund Admiral Shares (VGSLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Peek - 401(K) ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Total Bond Market Index Fund Admiral Shares (VBTIX) [MF]					
Peek - 401(K) ⇒ Vanguard Total International Bond Index Fd Admiral Shs (VTIBX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Peek - 401(K) ⇒ Vanguard Total International Stock Index Fd Admiral (VTIAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Peek - 401(K) ⇒ Vanguard Total Stock Market Index Fd Admiral Shs (VTSAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab - Brokerage #2 ⇒ Invesco RAFI Developed Markets ex-U.S. ETF (PXF) [EF]		03/14/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Invesco RAFI Developed Markets ex-U.S. Small-Mid ETF (PDN) [EF]		03/14/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Invesco RAFI Developed Markets ex-U.S. Small-Mid ETF (PDN) [EF]		08/06/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Invesco RAFI Developed Markets ex-U.S. Small-Mid ETF (PDN) [EF]		11/04/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]		08/06/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab - Brokerage #2 ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		03/14/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		11/04/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		12/20/2024	P	\$1,001 - \$15,000	
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		03/14/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		11/04/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		01/23/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		03/14/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		07/30/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		11/04/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Large Company ETF (FNDX) [EF]		12/31/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		03/14/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		07/30/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental U.S. Small Company ETF (FNDA) [EF]		12/31/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Schwab International Equity ETF (SCHF) [EF]		03/14/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab - Brokerage #2 ⇒ Vanguard Tax-Exempt Bond ETF (VTEB) [EF]		12/31/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Vanguard S&P 500 ETF (VOO) [EF]		03/14/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab - Brokerage #2 ⇒ Vanguard Small-Cap ETF (VB) [EF]		01/23/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	10/15/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	10/31/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	11/15/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	11/29/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	12/13/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	12/31/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	01/15/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	01/31/2024	P	\$1,001 - \$15,000	
Goldman Sachs - Brokerage ⇒ iShares National Muni Bond ETF (MUB) [EF]	SP	12/24/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Goldman Sachs - Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	12/09/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Goldman Sachs - Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	12/24/2024	P	\$1,001 - \$15,000	
Goldman Sachs - Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	12/24/2024	P	\$1,001 - \$15,000	
Goldman Sachs - Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	12/09/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Goldman Sachs - Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	12/24/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	02/15/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	02/29/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	03/14/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	03/29/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	04/15/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	04/30/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	05/15/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX)	SP	05/31/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
[MF]					
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	06/14/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	06/28/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	07/15/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	07/31/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	08/15/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	08/30/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	09/13/2024	P	\$1,001 - \$15,000	
Voya Financial - The Morning Consult LLC 401(K) ⇒ VOYA INDEX SOLUTION 2055 PORTFOLIO CL Z (VSZHX) [MF]	SP	09/30/2024	P	\$1,001 - \$15,000	

* 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
Morning Consult	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Central Loan Administration & Reporting	June 2020	Mortgage on primary residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Congressional Hispanic Leadership Institute

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2023	Filer and Lowenstein Sandler LLP	Continuing participation in a defined contribution plan managed by former employer. Employer no longer contributes to the plan.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">Charles Schwab - Brokerage #1 LOCATION: USCharles Schwab - Brokerage #2 LOCATION: USCharles Schwab - IRA ContributoryCharles Schwab - Brokerage (Owner: JT) LOCATION: USLowenstein Sandler - Vanguard - 401(K)

- Artsy - 401(K) (Owner: SP)
- Goldman Sachs - Brokerage (Owner: SP)
LOCATION: US
- Peek - 401(K) (Owner: SP)
- Goldman Sachs - IRA (Owner: SP)
- Voya Financial - The Morning Consult LLC 401(K) (Owner: SP)

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. Robert J. Menendez , 07/14/2025