



Filing ID #10068372

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Dwight Evans  
**Status:** Member  
**State/District:** PA03

## 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?
1602 E CARDEZA ST [RP]  LOCATION: Philadelphia, PA, US		\$100,001 - \$250,000	None		<input type="checkbox"/>
COMMONWEALTH OF PA PENSION [PE]		\$500,001 - \$1,000,000	PENSION PAYMENTS	\$50,001 - \$100,000	<input type="checkbox"/>
PERSHING LLC ⇒ AbbVie Inc. (ABBV) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ ALEXANDRIA REAL ESTATE EQUITIES [RE]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ Alibaba Group Holding Limited American Depositary Shares each representing one Ordinary share (BABA) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ AlphaCentric LifeSci Healthcare Fund Class I (LYFIX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
PERSHING LLC ⇒ AMERICAN TOWER CORP [RE]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ American Water Works Company, Inc. (AWK) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ Amplify ETF Trust Amplify Etho Climate Leadership U.S. ETF (ETHO) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ Apollo Global Management, Inc. Class A (APO) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ ARIEL FUND INVESTOR [MF]		\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ CALVERT GREEN BOND FUND CLASS 1 [MF]		\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ CATALYST MILLBURN HEDGE STRATEGY [MF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ CVS Health Corporation Common Stock (CVS) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ DBA Sempra (SRE) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ EMERALD BANKING & FINANCE FUND [MF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ Emerald Growth Fund Institutional Class (FGROX) [MF]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ ETFMG VIDEO GAME TECH [EF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ FS MULTI-STRATEGY ALTERNATIVES FUND [MF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
General Dynamics Corporation (GD) [ST]					
PERSHING LLC ⇒ GLOBAL X LITHIUM & BATTERY ETF [EF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ GOLDMAN SACHS EMERGING MARKETS [MF]		\$15,001 - \$50,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ International Business Machines Corporation (IBM) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ INVESCO CORPORATE BOND [MF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ ISHARES NASDAQ BIOTECHNOLOGY [EF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ JANUS HENDERSON GLOBAL EQUITY [MF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ Kinder Morgan, Inc. (KMI) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ Kyndryl Holdings, Inc. Common Stock (KD) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ LORD ABBETT FLOATING RATE [MF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ Micron Technology, Inc. - Common Stock (MU) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
PERSHING LLC ⇒ NUVEEN DIVIDEND VALUE [MF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ NUVEEN PREFERRED SECS & INC [MF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ ONEOK, Inc. (OKE) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ PACER FDS TR US CASH COWS 100 ETF [EF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ PGIM Core Bond Fund Class Z (TAIBX) [MF]		\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
PERSHING LLC ⇒ PGIM GLOBAL TOTAL RETURN [MF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ PIMCO REAL RETURN INST [MF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ Quanta Services, Inc. (PWR) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ Roche Holdings AG Basel American Depositary Shares (RHHBY) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ ServiceNow, Inc. Common Stock (NOW) [ST]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ SPDR S&P METALS AND MINING ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ Thermo Fisher Scientific Inc (TMO) [ST]		\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
PERSHING LLC ⇒ VICTORY INCORE FUND FOR INCOME [MF]		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
PERSHING LLC ⇒ Williams Companies, Inc. (WMB) [ST]		\$1,001 - \$15,000	Dividends	None	<input 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?
PERSHING LLC ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		10/29/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
PERSHING LLC ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		10/29/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
PERSHING LLC ⇒ PGIM Core Bond Fund Class Z (TAIBX) [MF]		11/29/2024	P	\$1,001 - \$15,000	
PERSHING LLC ⇒ Franklin Income Fund Advisor Class (FRIAX) [MF]		10/02/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
PERSHING LLC ⇒ Western Asset Core Plus Bond Fund Class I (WACPX) [MF]		11/29/2024	S	\$1,001 - \$15,000	<input 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**

None disclosed.

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
	PA STATE EMPLOYEES CREDIT UNION	09/13/2013	MORTGAGE	\$15,001 - \$50,000
	NATIONSTAR MORTGAGE dba MR COOPER	09/29/2017	MORTGAGE	\$100,001 - \$250,000

**SCHEDULE E: POSITIONS**

None disclosed.

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
January 2019	Commonwealth of PA and Dwight Evans	Participation in an employee health care benefit from the Commonwealth of Pennsylvania

## 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

- o PERSHING LLC

## 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. Dwight Evans , 05/14/2025