



Filing ID #10054525

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Jerry Lee Carl Jr.  
**Status:** Member  
**State/District:** AL01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 05/15/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Advance LLC [OL]		\$1,000,001 - \$5,000,000	Interest, Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Mobile, AL, US					
DESCRIPTION: Advance LLC-Commercial Real Estate					
Ascensus 401k ⇒ Goldman Sachs Balanced Strat C [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$15,001 - \$50,000	<input type="checkbox"/>
Ascensus 401k ⇒ Goldman Sachs Growth & Inc Strat C [MF]		\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$15,001 - \$50,000	<input type="checkbox"/>
Ascensus 401k ⇒ Goldman Sachs Growth Strat C [MF]		\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$15,001 - \$50,000	<input type="checkbox"/>
Ascensus 401k ⇒ Goldman Sachs Growth Strat C [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$15,001 - \$50,000	<input type="checkbox"/>
AXA Life Insurance ⇒ AXA Large Cap Growth Managed Volatility [MF]		\$50,001 - \$100,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	<input type="checkbox"/>
AXA Life Insurance ⇒ AXA Moderate Allocation [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AXA Life Insurance ⇒ AXA/AB Small Cap Growth [MF]		\$50,001 - \$100,000	Capital Gains, Dividends, Interest	\$15,001 - \$50,000	<input type="checkbox"/>
AXA Life Insurance ⇒ EQ/BlackRock Basic Value Equity [MF]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Butterfly & Cricket LLC [OL]	JT	\$500,001 - \$1,000,000	Partnership Income	None	<input type="checkbox"/>
LOCATION: Mobile, AL, US DESCRIPTION: Butterfly & Cricket LLC-Timber Land					
Community Bank [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
ECM Home Health Services Inc. [OL]	SP	\$500,001 - \$1,000,000	S Corporation Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Mobile, AL, US DESCRIPTION: ECM Home Health Services					
PNC Bank Accounts [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
Prudential Annuity ⇒ AST Capital Growth Asset [MF]		\$250,001 - \$500,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Prudential Annuity ⇒ AST Capital Growth Asset [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	<input type="checkbox"/>
River Oaks Landing LLC [OL]		\$1,000,001 - \$5,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Mobile, AL, US DESCRIPTION: River Oaks Landing-Bed and Breakfast					
RSA Alabama [DB]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Trustmark Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

\* Asset class 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

None disclosed.

**SCHEDULE C: EARNED INCOME**

Source	Type	Amount
ECM Home Health Services	Spouse Salary	N/A

**SCHEDULE D: LIABILITIES**

Owner Creditor	Date Incurred	Type	Amount of Liability
Hancock Whitney	March 2019	Line of Credit	\$100,001 - \$250,000

**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**

None disclosed.

**SCHEDULE A AND B ASSET CLASS DETAILS**

- Ascensus 401k
- Ascensus 401k (Owner: SP)
- AXA Life Insurance
- Prudential Annuity
- Prudential Annuity (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. Jerry Lee Carl Jr., 05/15/2023