



Filing ID #10046381

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Donald W. Norcross
Status: Member
State/District: NJ01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 08/11/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Allsp VT SmCpGrw Cl2 [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Allspring Spectrum Growth CL C [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Allspring Spectrum Moderate Growth CL C [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Am Cent VP Intl CL II [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Century Short Duration Inflation Protected BD INSTL CL [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
American Century Short Duration Inflation Protected BD INSTL CL [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
American Century Short Duration Inflation Protected BD INSTL CL [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Ameriprise Cert. Co. [BA]	JT	\$50,001 - \$100,000	Interest	Not Applicable	<input type="checkbox"/>
Ameriprise Insured Money Market [BA]	SP	\$1 - \$1,000	Interest	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ameriprise Insured Money Market [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Ameriprise Insured Money Market [BA]	SP	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
Ameriprise Insured Money Market [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Ameriprise Insured Money Market [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Ameriprise Insured Money Market [BA]	SP	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
Calamos Market Neutral Income CL I [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Calvert Bond Instl CL [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Cigna Corporation (CI) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Col VP Disc Core Cl3 [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Col VP Divnd Opp Cl3 [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Col VP GlblStInc Cl3 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Col VP Hgh Yld Bd CL3 [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Col VP Intmd Bnd Cl3 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Col VP MidCap Gr Cl3 [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Col VP Ovrseas Core 3 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Columbia Convertible Securities Instl CL [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Columbia Convertible Securities Instl CL [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Columbia Dividend Income Instl CL [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Columbia Global Value Instl CL [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Columbia Large Cap Value CL A [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Columbia Seligman Technology & Information Instl CL [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Columbia Strategic Income Instl CL [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Congressional Federal Credit Union [BA]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
CTIVP LoomisSylsGr C1 [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Delaware Emerging Markets Instl CL I [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fid VIP MidCap CL2 [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Advisor Growth Oppty CL I [MF]	JT	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Fidelity Advisor Health Care CL I [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Advisor New Insights CL I [MF]	SP	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Advisor New Insights CL I [MF]		\$100,001 - \$250,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Advisor Strategic Income CL I [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Advisor Total Bond CL I [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Contrafund [PE]		\$500,001 - \$1,000,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Franklin Rising Dividends CL A [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Franklin Small Cap Growth Advisor CL [MF]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Goldman Sachs GQG Partners Intl Opptys Investor CL [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Goldman Sachs GQG Partners Intl Opptys Investor CL [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Guaranteed Deposit Fund [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Healthcare Employees Federal Credit Union [BA]	SP	\$1,001 - \$15,000	Interest	Not Applicable	<input type="checkbox"/>
IBEW Local 351 Pension Benefit Fund [DB]		Undetermined	None		<input type="checkbox"/>
IBEW Local 351 Surety Plan Fixed Interest Fund [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
IShares Core S&P 500 ETF [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
IShares Core S&P Small Cap ETF [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
IShares Core S&P Small Cap ETF [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
IShares Russell Mid Cap ETF [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Lazard International Equity Fd [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
MassMutual Diversified Bond Fd [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
MFS Diversified Income CL A [MF]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	<input type="checkbox"/>
MFS Emerging Markets Debt CL 1 [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
MFS Emerging Markets Debt CL I [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
MFS Intl Intrinsic Value CL I [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
National Electrical Benefit Fund [DB]		Undetermined	None		<input type="checkbox"/>
COMMENTS: NEBF is a Taft-Hartley, multiemployer, defined benefit pension plan in which Congressman Norcross is vested.					
New Jersey Defined Contribution Retirement plan [DB]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Principal Real Estate Secs Fd [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
T. Rowe Price Blue Chip Growth ETF (TCHP) [PE]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
TD Bank [BA]	JT	\$15,001 - \$50,000	Interest	Not Applicable	<input type="checkbox"/>
Toronto Dominion Bank (TD) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Toronto Dominion Bank (TD) [ST]	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Truist Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Value Line Asset Alloc Instl CL [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard Mid Cap Index Fund [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Small Cap Index Fund [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Wanger USA [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

* 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?
American Century Short Duration Inflation Protected Bd Instl CL [MF]	JT	04/8/2021	P	\$15,001 - \$50,000	
American Century Short Duration Inflation Protected BD INSTL CL [MF]	SP	12/29/2021	P	\$15,001 - \$50,000	
American Century Short Duration Inflation Protected BD INSTL CL [MF]		12/29/2021	P	\$1,001 - \$15,000	
Calamos Market Neutral Income CL I [MF]		04/8/2021	P	\$1,001 - \$15,000	
Calvert Bond Instl CL [MF]	JT	12/28/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Columbia Convertible Securities Instl CL [MF]		12/28/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Columbia Dividend Income Instl CL [MF]	JT	04/8/2021	P	\$15,001 - \$50,000	
Columbia Large Cap Value CL A [MF]	JT	Monthly	P	\$1,001 - \$15,000	
Columbia Strategic Income Instl CL [MF]		04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Delaware Emerging Markets Instl CL [MF]		12/28/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Advisor Total Bond CL I [MF]	SP	12/28/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
Goldman Sachs GQG Partners Intl Oppty Investor CL [MF]	JT	12/28/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
IShares Core S&P 500 ETF [MF]	JT	12/28/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
IShares Core S&P Small Cap ETF [MF]	JT	12/28/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
IShares Core S&P Small Cap ETF [MF]	SP	04/28/2021	P	\$1,001 - \$15,000	
IShares Russell Mid Cap ETF [MF]	JT	12/28/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
MFS Emerging Markets Debt CL 1 [MF]	JT	04/8/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
MFS Emerging Markets Debt CL 1 [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Templeton Global Bond Advisor CL [MF]	JT	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Value Line Asset Alloc Instl CL [MF]		12/29/2021	P	\$1,001 - \$15,000	

* 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
Virtua West Jersey Health Systems	Spouse salary	N/A
IBEW Local Union 351 Pension Fund	Pension	\$46,031.88
National Electrical Benefit Fund	Pension	\$7,324.77
IBEW Pension Benefit Fund	Pension	\$1,491.36

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Truist Bank	June, 2012	Mortgage	\$250,001 - \$500,000
JT	TD Bank	May 2016	Home Equity LOC	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Aspen Institute Gettysburg	10/22/2021	10/24/2021	Washington, DC - Gettysburg, PA - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

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. Donald W. Norcross , 08/11/2022