



Filing ID #10062517

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Jonathan Jackson
Status: Member
State/District: IL01

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2022
Filing Date: 08/2/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
3 I Roadwork, Inc. [OL] LOCATION: Chicago, IL, US DESCRIPTION: Roadwork Company		\$50,001 - \$100,000	Distributions	Not Applicable	\$50,001 - \$100,000
Chase Bank [BA] DESCRIPTION: Checking & Savings	JT	\$15,001 - \$50,000	None		
Chase Bank - DC #1 [BA]	DC	\$15,001 - \$50,000	None		
Chase Bank - DC #2 [BA]	DC	\$15,001 - \$50,000	None		
Morgan Stanley IRA ⇒ MORGAN STANLEY BANK N.A. # [BA]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Trust Account ⇒ Abbott Laboratories (ABT) [ST]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$201 - \$1,000
Morgan Stanley Trust Account ⇒ Agree Realty Corporation (ADC) [ST]	JT	\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
Morgan Stanley Trust Account ⇒	JT	None	Capital Gains	Not	\$2,501 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Amazon.com, Inc. (AMZN) [ST]				Applicable	\$5,000
Morgan Stanley Trust Account ⇒ Analog Devices, Inc. (ADI) [ST]	JT	\$15,001 - \$50,000	None		
Morgan Stanley Trust Account ⇒ Apple Inc. (AAPL) [ST]	JT	\$15,001 - \$50,000	None		
Morgan Stanley Trust Account ⇒ Blackstone Inc. (BX) [ST]	JT	None	Capital Gains, Dividends	Not Applicable	\$5,001 - \$15,000
Morgan Stanley Trust Account ⇒ Chevron Corporation (CVX) [ST]	JT	None	None		
Morgan Stanley Trust Account ⇒ COOK CNTY ILL SCH DIST NO 081 SCHILLER OID [GS]	JT	\$15,001 - \$50,000	None		
DESCRIPTION: Coupon Rate 2.250%; Matures 12/01/2038					
Morgan Stanley Trust Account ⇒ Deere & Company (DE) [ST]	JT	None	None		
Morgan Stanley Trust Account ⇒ DTE Energy Company (DTE) [ST]	JT	\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
Morgan Stanley Trust Account ⇒ DU PAGE COOK & WILL CNTYS ILL CMNTY COLLEGE DIST REF [GS]	JT	\$1,001 - \$15,000	Interest	Not Applicable	\$201 - \$1,000
DESCRIPTION: Coupon Rate 5.000%; Matures 06/01/2023					
Morgan Stanley Trust Account ⇒ Ecolab Inc. (ECL) [ST]	JT	None	Capital Gains	Not Applicable	\$2,501 - \$5,000
Morgan Stanley Trust Account ⇒ First Trust NASDAQ Clean Edge Green Energy Index Fund (QCLN) [ST]	JT	None	Capital Gains	Not Applicable	\$5,001 - \$15,000
Morgan Stanley Trust Account ⇒ GLENDALE HEIGHTS ILL [GS]	JT	\$15,001 - \$50,000	Interest	Not Applicable	\$201 - \$1,000
DESCRIPTION: Coupon Rate 5.000%; Matures 12/15/2023;					
Morgan Stanley Trust Account ⇒ Graphic Packaging Holding Company (GPK) [ST]	JT	\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley Trust Account ⇒ Hartford Financial Services Group, Inc. (HIG) [ST]	JT	\$15,001 - \$50,000	None		
Morgan Stanley Trust Account ⇒ Heico Corporation (HEI) [ST]	JT	\$15,001 - \$50,000	None		
Morgan Stanley Trust Account ⇒ ILLINOIS ST GENL OBLIG [GS] DESCRIPTION: Coupon Rate 4.000%; Matures 06/01/2041	JT	\$1,001 - \$15,000	None		
Morgan Stanley Trust Account ⇒ INVESCO RCH AMTFR NY MUN Y (ONYXX) [MF]	JT	None	None		
Morgan Stanley Trust Account ⇒ INVESCO S&P 500 PURE GROWTH ET (RPG) [EF]	JT	None	None		
Morgan Stanley Trust Account ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	None	Capital Gains, Dividends	Not Applicable	\$2,501 - \$5,000
Morgan Stanley Trust Account ⇒ LORD ABBETT HI INC MUNI BD I (HYMIX) [MF]	JT	None	None		
Morgan Stanley Trust Account ⇒ MAINSTAY MCKAY HGYLD CO BD I (MHYIX) [MF]	JT	None	None		
Morgan Stanley Trust Account ⇒ MAINSTAY MCKAY TX FREE BD I (MTBIX) [MF]	JT	None	None		
Morgan Stanley Trust Account ⇒ McKesson Corporation (MCK) [ST]	JT	\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
Morgan Stanley Trust Account ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$15,001 - \$50,000	None		
Morgan Stanley Trust Account ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$100,001 - \$250,000	Dividends	Not Applicable	\$1,001 - \$2,500
Morgan Stanley Trust Account ⇒ MORGAN STANLEY BANK N.A. # [BA]	JT	\$250,001 - \$500,000	None		
Morgan Stanley Trust Account ⇒ NextEra Energy, Inc. (NEE) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	Not Applicable	\$15,001 - \$50,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley Trust Account ⇒ NUVEEN EHCD MUN CRED OPP FD (NZF) [EF]	JT	None	None		
Morgan Stanley Trust Account ⇒ NVIDIA Corporation (NVDA) [ST]	JT	None	Capital Gains, Dividends	Not Applicable	\$15,001 - \$50,000
Morgan Stanley Trust Account ⇒ Procter & Gamble Company (PG) [ST]	JT	None	Dividends	Not Applicable	\$201 - \$1,000
Morgan Stanley Trust Account ⇒ Raytheon Technologies Corporation (RTX) [ST]	JT	None	Dividends	Not Applicable	\$1 - \$200
Morgan Stanley Trust Account ⇒ Salesforce, Inc. (CRM) [ST]	JT	None	Capital Gains	Not Applicable	\$5,001 - \$15,000
Morgan Stanley Trust Account ⇒ Sanofi - American Depositary Shares (SNY) [ST]	JT	None	None		
Morgan Stanley Trust Account ⇒ SPDR S&P GLB NAT RESOURCES (GNR) [EF]	JT	None	Capital Gains, Dividends	Not Applicable	\$1,001 - \$2,500
Morgan Stanley Trust Account ⇒ The Hershey Company (HSY) [ST]	JT	\$50,001 - \$100,000	Dividends	Not Applicable	\$201 - \$1,000
Morgan Stanley Trust Account ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	\$15,001 - \$50,000	None		
Morgan Stanley Trust Account ⇒ Walmart Inc. (WMT) [ST]	JT	None	None		
Morgan Stanley Trust Account ⇒ Waste Connections, Inc. Common Shares (WCN) [ST]	JT	\$15,001 - \$50,000	Dividends	Not Applicable	\$1 - \$200
Morgan Stanley Trust Account ⇒ WILL & KENDALL CNTYS ILL CMNTY CONS SCH DIST NO 202 [GS] DESCRIPTION: Coupon Rate 5.000%; Matures 01/01/2023	JT	\$1,001 - \$15,000	None		
Mutual of America - Muhammad Ali Museum & Education Center, Inc. 401(k) Plan ⇒ Retirement 2030 Fund (MURIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
R.E. Partnerships 1802 E. 71st St. LLC Roseland	JT	\$250,001 -	Rent	Not	\$100,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Building Venture [RP] LOCATION: Chicago, IL, US		\$500,000		Applicable	\$1,000,000
S. Cornell Property [RP] LOCATION: Chicago, IL, US	JT	\$500,001 - \$1,000,000	Rent	Not Applicable	\$15,001 - \$50,000
S. Crandon Ave. Property [RP] LOCATION: Chicago, IL, US	JT	None	Capital Gains, Rent	Not Applicable	\$100,001 - \$1,000,000
S. King Drive Property [RP] LOCATION: Chicago, IL, US	JT	\$250,001 - \$500,000	Rent	Not Applicable	\$15,001 - \$50,000
Vanguard - United Way of Metropolitan Chicago DC Plan ⇒ Vanguard Target Retirement 2030 Fund (VTHR) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		

* 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 Current Year to Filing	Amount Preceding Year
Muhammad Ali Foundation	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America	December 2022	Credit Card	\$10,000 - \$15,000
	Morgan Stanley Liquidity Access Line	May 2022	Liquidity Access Line	\$250,001 - \$500,000
SP	Chase	May 2020	Home Equity Line of Credit	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
National Spokesperson	Rainbow PUSH Coalition
Board Member	3e, LLC
Owner	3 I Roadwork, Inc.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Morgan Stanley IRA
- Morgan Stanley Trust Account (Owner: JT)
DESCRIPTION: 083057
- Mutual of America - Muhammad Ali Museum & Education Center, Inc. 401(k) Plan (Owner: SP)
- Vanguard - United Way of Metropolitan Chicago DC Plan (Owner: SP)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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

COMMENTS

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. Jonathan Jackson , 08/2/2024