



Filing ID #10053797

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Jeff Jackson
Status: Member
State/District: NC14

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2022
Filing Date: 08/13/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401k ⇒ Fidelity Total International Index Fund (FTIHX) [EF]		\$50,001 - \$100,000	None		
401k ⇒ Fidelity Total Market Index Fund (FSKAX) [EF]		\$100,001 - \$250,000	None		
Brokerage Account ⇒ Vanguard Dividend Appreciation Index Fund ETF (VIG) [EF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Brokerage Account ⇒ Vanguard Intl Dividend Appreciation Index Fund ETF (VIGI) [EF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Brokerage Account ⇒ Vanguard U.S. Growth Fund Investor Shares (VWUSX) [EF]		\$15,001 - \$50,000	Dividends	Not Applicable	\$1 - \$200
Cryptocurrency ⇒ Ankr [OT] DESCRIPTION: Cryptocurrency		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Cryptocurrency ⇒ Cardano [OT] DESCRIPTION: Cryptocurrency		\$1,001 - \$15,000	None		
Cryptocurrency ⇒ Solana [OT] DESCRIPTION: Cryptocurrency		\$1,001 - \$15,000	None		
Cryptocurrency ⇒ Tether [OT] DESCRIPTION: Cryptocurrency		\$15,001 - \$50,000	None		
Defined Benefit Pension Plan ⇒ Legislative Retirement System Pension Plan [DB]		Undetermined	None		
MURNX Mutual of America 2050 Retirement [EF]	SP	\$100,001 - \$250,000	None		
Roth IRA ⇒ Vanguard U.S. Growth Fund Admiral Shares (VWUAX) [EF]		\$50,001 - \$100,000	None		
USAA Age-Based Portfolio (0-2) [5P] LOCATION: NC	DC	\$1,001 - \$15,000	None		
USAA Very Aggressive Portfolio [5P] LOCATION: NC	DC	\$15,001 - \$50,000	None		
VTTSX - Vanguard Target Retirement 2060 Fund [EF]	SP	\$15,001 - \$50,000	None		

* 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 C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Levine Jewish Community Center	Spouse salary	N/A	N/A
North Carolina Army National Guard	Salary	N/A	\$15,057.10
Womble Bond Dickinson US LLP	Salary	N/A	\$32,720.88
North Carolina General Assembly	Salary	N/A	\$17,094.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Atlantic Bay Mortgage Group	2020	Mortgage on personal residence in Charlotte, NC	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2015	Womble Bond Dickinson	401k Retirement Plan
May 2014	Legislative Retirement System and Self	Pension plan

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">401kBrokerage Account LOCATION: USCryptocurrency LOCATION: USDefined Benefit Pension Plan LOCATION: USRoth IRA
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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

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. Jeff Jackson , 08/13/2023