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GPO Member Guide)

Sen. Lamar Alexander (R-TN)

Senate · Republican (most recent term) · TN · in Congress 2003–2021 ·
Bioguide ID A000360

Party history: R 2003–2021. Source: term data in [unitedstates/congress-legislators](#) (CC0);
party shown is as recorded per term there.

Estimated net worth (from public disclosures)

Estimate	Report year	Low	Mid	High
(a) Estimated net worth at the earliest available report (2014); the member entered office earlier, in 2003	2014	– \$10,328,960	\$4,218,017	\$18,764,994
(b) Latest net worth estimate	2019	–\$7,752,956	\$10,806,019	\$29,364,994
(c) Estimated gain / loss, nominal dollars, 2014 → 2019 (5 years spanned)	2014– 2019	– \$26,517,950	+ \$6,588,002	+ \$39,693,954

Gain Low = latest Low – earliest High; Gain High = latest High – earliest Low (widest possible spread); Mid = latest Mid – earliest Mid.

Reliability flags (net worth): none for these two endpoints. **Included in the recommended dollar-gain ranking.**

Net worth by report year (mid; Low–High)

Report year	Assets (mid)	Liabilities (mid)	Net worth mid	Low ... High	Status / flags
2014	\$14,718,020	\$10,500,003	\$4,218,017	–\$10,328,960 ... \$18,764,994	computed
2015	\$23,410,520	\$16,875,004	\$6,535,516	–\$18,043,959 ... \$31,114,991	computed
2016	\$20,873,522	\$9,825,003	\$11,048,519	–\$7,382,956 ... \$29,479,994	computed
2017	\$19,325,024	\$10,125,003	\$9,200,020	–\$7,774,953 ... \$26,174,994	computed
2018	\$20,849,523	\$10,500,003	\$10,349,520	–\$8,310,954 ... \$29,009,994	computed

2019	\$20,963,522	\$10,157,503	\$10,806,019	-\$7,752,956 ... computed \$29,364,994
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- **What this is:** Net worth = Schedule A assets (each value range at its midpoint; low–high range shown) minus Schedule D liabilities (midpoints / ranges). **Low** = assets at range floors minus liabilities at range ceilings; **Mid** = midpoints; **High** = assets at ceilings minus liabilities at floors. Low and High are outer bounds of the reported ranges, not likely outcomes.
- **What it excludes / understates:** exact values (only ranges are reported); a **personal residence is not reported as an asset** (although a mortgage on it may be listed as a liability, which then lowers the estimate); retirement and federal accounts (e.g. Thrift Savings Plan, defined-benefit pensions) are only partly or not reported; assets of excepted/blind trusts, cash held below reporting thresholds, vehicles, household goods and most spouse/dependent items exempt from reporting are not included; liabilities on a personal residence, revolving credit under thresholds and loans to family may be omitted by filers.
- **Open-ended top ranges** (e.g. "Over \$50,000,000") are counted at their **lower bound** and flagged, so such values are understated.
- The change is a change in **estimated net worth in nominal dollars** (no inflation adjustment). It includes salary, gifts, inheritances, business income and re-valuation as well as investment results, and it is subject to range-bracket noise; it is **not** an investment return and implies nothing about conduct.

Read this first. Members report asset values only as *ranges* (e.g. "\$15,001 – \$50,000"), never exact dollars. Every figure below is an **estimate** computed from range midpoints, not a measured return. Figures cannot be interpreted as investment performance, and they do not show wrongdoing or skill. Methodology and limitations are at the end and in the project README. Sources: public financial disclosure reports filed with the Clerk of the U.S. House of Representatives and/or the Secretary of the Senate (Senate eFD), linked below.

AVG. ANNUAL
CHANGE
(GEOMETRIC, EST.)
+11.8%

SIMPLE AVERAGE OF
YEARS
+12.2%

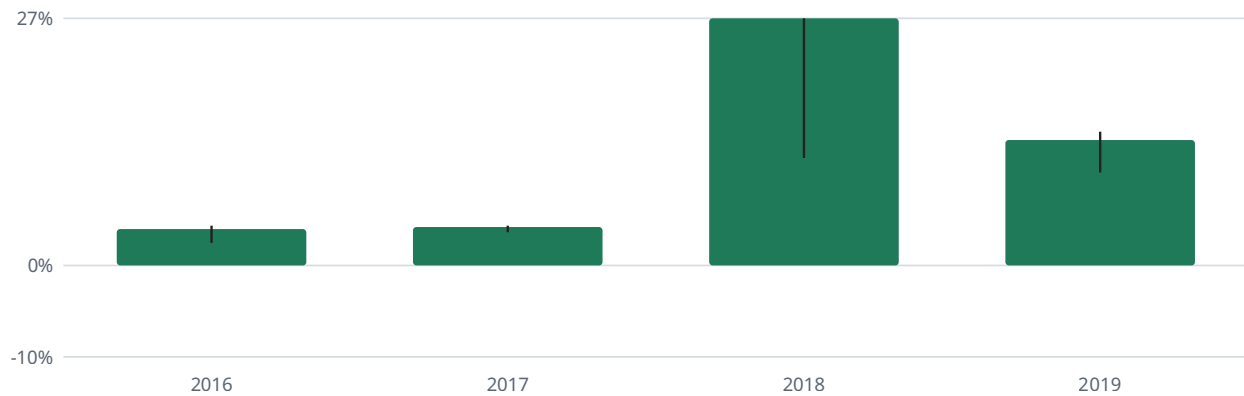
YEARS ESTIMATED
4

BEST / WORST
SINGLE YEAR
2018 +27%
2016 +4%

Reliability flags: few years (4).

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +6.9% to +13.2%. This band is narrow because it moves both years together; the true uncertainty is larger — see the per-year "strict envelope" column and the limitations.

Estimated year-over-year change



Bars: midpoint estimate; whisker: same-position floor/ceiling band. Axis clipped to -100%...+150%. Years with insufficient traceable holdings are omitted.

Year (t-1 → t)	Opening value (mid)	Closing value (mid)	Income (mid)	Buys (mid)	Sales (mid)	Est. gain	Same-position band	Strict envelope	Traced coverage	St. fla
2014→2015	\$1,580,005	\$4,982,506	\$76,202	\$255,503	\$215,002	+217.6%	+127.7% ... +259.9%	-4% ... +440%	11%	ex no eli tra co 11% 60
2015→2016	\$22,137,515	\$20,330,016	\$2,800,909	\$204,504	\$91,002	+4.0%	+2.5% ... +4.3%	-122% ... +130%	95%	co
2016→2017	\$19,905,514	\$18,095,514	\$2,768,658	\$455,503	\$333,002	+4.2%	+3.6% ... +4.3%	-119% ... +127%	95%	co
2017→2018	\$14,159,518	\$16,286,517	\$1,692,663	\$40,501	\$48,502	+27.0%	+11.8% ... +31.4%	-106% ... +160%	73%	co
2018→2019	\$16,061,016	\$16,618,516	\$1,693,762	\$48,502	\$0	+13.7%	+10.2% ... +14.6%	-114% ... +142%	77%	co

Filings used

Each annual-report year uses one filing (most recently filed version among originals/amendments whose Schedule A row count is $\geq 40\%$ of the largest). Electronic (text) PDFs are parsed. Scanned/image-only filings are OCR-read and used **only** if they pass the explicit validation gates described in the project README (value/income coverage, two-engine agreement, exact bracket snapping, page completeness, year-to-year position continuity); such years are labelled **OCR-derived** below. Scanned filings that fail validation are listed as "insufficient data – scanned".

Report year	Doc ID	Type	Filed	Schedule A rows	Rows with unparsed value	Source (official filing) / SHA-256
2014	88f4fc2c-e599-44e9-a704-fbebd05f4207	Senate annual	05/14/2015	40	0	Senate eFD report 8bc950a77077f04ae22e8f3c5578da30eed44410e1adccf6c38bcaaff7c47d87
2015	0274c846-a8e6-4ab1-9d52-7df85fd24624	Senate annual	06/15/2016	41	0	Senate eFD report 562bfa4eff33e6ee687a442f9605dbb09792ea6f49d1aa6b81f63b4d0f721170
2016	92253f05-21d3-4e24-bb94-854ec6bb5125	Senate amendment	08/06/2018	44	0	Senate eFD report e346c9cc2eba847ea2fef232519605391b648385f655f0ed173fde430b37c9a0
2017	533dcdcf-ed4a-4082-a271-68b0992f804b	Senate amendment	06/20/2019	47	0	Senate eFD report ef30de4e4e230b3f2708c66177c4f5e8f289830e92ec2c106f466c494a3a1941
2018	d04e5204-0b6a-42ae-a4c1-08565193f2c4	Senate amendment	08/12/2020	46	0	Senate eFD report de0da4e1a412a5931b5b1a90109a0b3850f71e28d18f23949cf68cbcd28ff55f

2019	7e39d142-edda-43bf-a30f-89926f6957bc	Senate annual	08/12/2020	44	0	Senate eFD report ca73c9e4a63 bbc461c0e81 ff0c9a6f975 b289c418bc2 845ac2882a e744efbefe
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Largest movers 2016→2017

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Custom Foods of America, Inc. Company: Custom Foods of America, Inc. (Knoxville, Tennessee)	—	held	\$1,000,001 - \$5,000,000	\$500,001 - \$1,000,000	\$0	\$0
Starboard Corporation - Commercial Real Estate Company: Starboard Corporation (San Antonio)	SP	held	\$250,001 - \$500,000	\$500,001 - \$1,000,000	\$0	\$0
DTC International Equity Common Trust Fund	SP	held	\$250,001 - \$500,000	\$500,001 - \$1,000,000	\$175,000	\$158,002
First Tennessee (Knoxville, Tennessee) Type: Checking, Savings	—	held	\$250,001 - \$500,000	\$15,001 - \$50,000	\$0	\$0
VFINX-Vanguard 500 Index Inv	SP	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
First Tennesseese (Knoxville, Tennessee) Type: Checking, Savings	SP	held	\$100,001 - \$250,000	\$50,001 - \$100,000	\$0	\$0
TORIX-Tortoise MLP & Pipeline Instl	SP	held	\$100,001 - \$250,000	\$50,001 - \$100,000	\$0	\$0
DTC Multi-Strategy Common Trust Fund	SP	held	\$100,001 - \$250,000	\$15,001 - \$50,000	\$105,502	\$175,000

Largest movers 2017→2018

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Custom Foods of America, Inc. Company: Custom Foods of America, Inc. (Knoxville, Tennessee)	—	held	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$0	\$0
VFINX-Vanguard 500 Index Inv	SP	held	\$250,001 - \$500,000	\$100,001 - \$250,000	\$0	\$0

VEXMX-Vanguard Extended Market Idx Inv	SP	held	\$100,001 - \$250,000	\$50,001 - \$100,000	\$0	\$0
First Tennesseese (Knoxville, Tennessee) Type: Checking, Savings	SP	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0
VTAPX - Vanguard Shrt-Term Infl-Prot Sec Idx Adm	SP	held	\$1,001 - \$15,000	\$50,001 - \$100,000	\$0	\$0
Fidelity Government Money Market Rate/Coupon: None Matures: None	SP	held	\$1,001 - \$15,000	\$50,001 - \$100,000	\$0	\$0
DTC International Equity Common Trust Fund	SP	held	\$500,001 - \$1,000,000	\$500,001 - \$1,000,000	\$40,501	\$8,000
First Tennessee (Knoxville, Tennessee) Type: Checking, Savings	—	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$0

Largest movers 2018→2019

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
VFINX-Vanguard 500 Index Inv	SP	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
DTC US Active Equity Common Trust Fund	SP	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
VEXMX-Vanguard Extended Market Idx Inv	SP	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0
VTAPX - Vanguard Shrt-Term Infl-Prot Sec Idx Adm	SP	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$32,500	\$0
Fidelity Government Money Market Rate/Coupon: None Matures: None	SP	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0
LSFYX - Loomis Sayles Sr Floating Rate and F/I Y	SP	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$16,001	\$0
Alexander Investment Company LP - 0.02% General Partnership Interest Company: Alexander In	—	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Tennessee HSG Dev Agy Rate/Coupon: 2.70% Matures: 01/01/2024	SP	held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$0	\$0

Method (summary)

1. Schedule A asset rows are read from each annual report; the dollar range for each row is converted to its midpoint. Open-ended top ranges ("Over \$50,000,000") are excluded from the traced set and counted as a coverage loss.

2. Positions are matched year to year by owner code (self/SP/DC/JT) + normalised asset name. A position that appears only in year t is included only if Schedule B shows a purchase of it in year t (opening value 0); a position that disappears is included only if Schedule B shows a sale (closing value 0). Otherwise it is excluded as unexplained.
3. Estimated gain = (closing – opening + reported income – purchases + sale proceeds) ÷ opening, all at midpoints, for the traced positions. “Capital gains” income is not added again (it is already in value change and sale proceeds).
4. A year counts only if traced opening value ≥ \$50,000 and traced coverage ≥ 60% of the opening midpoint. A member is ranked only with ≥ 3 such years (exactly 2 = “limited data”, shown but unranked). Average = geometric mean of (1+yearly estimate).

Limitations

- Ranges are wide (up to a factor of 5 or more, and up to \$50M+ open-ended); a holding can move between ranges without any real change in value, and stay in a range while moving materially. Yearly estimates are therefore noisy; the “strict envelope” shows the mathematical worst/best case and is typically wider than ±100%.
- Purchases and sales are only disclosed as ranges and only for transactions over \$1,000; partial sales, dividend reinvestment, spousal/dependent accounts and retirement-plan funds are reported inconsistently. Excepted/ blind trusts, personal residences and certain pensions are not reported at all.
- Filers sometimes change how they list assets (e.g. listing a brokerage account vs. its individual holdings), which can make positions untraceable across years; these are excluded rather than guessed.
- Asset values in an annual report are as of Dec 31 of the reporting year; the report year t–1→t covers that calendar year. Late or amended filings are used when filed; extensions can delay them.
- The text of these reports is machine-parsed from PDFs; parse errors are possible. Every number links back to the cited filing. This is not investment advice.
- Use of these filings is restricted by 5 U.S.C. § 105(c) (no unlawful, commercial or credit-rating purpose, and none for solicitation of money).

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Figures are estimates derived from value ranges reported in public financial disclosures; they are not exact values and are not financial advice.