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GPO Member Guide)

## Sen. Lisa Blunt Rochester (D-DE)

House / Senate · Democrat (most recent term) · DE · in Congress 2017–present · Bioguide ID B001303

**Party history by chamber:** House D 2017–2025, Senate D 2025–present. 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 before entering office (report year 2016)         | 2016          | \$5,487,087      | <b>\$8,914,043</b>             | \$12,340,999              |
| (b) Latest net worth estimate                                             | 2025          | \$4,504,049      | <b>\$10,969,524</b>            | \$17,434,998              |
| (c) Estimated gain / loss, nominal dollars, 2016 → 2025 (9 years spanned) | 2016–<br>2025 | –<br>\$7,836,950 | <b>+</b><br><b>\$2,055,480</b> | <b>+</b><br>+\$11,947,911 |

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

**Reliability flags (net worth):** 2016: 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket. **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                                                                                                                     |
|-------------|--------------|-------------------|---------------------|------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| 2016        | \$8,946,544  | \$32,500          | <b>\$8,914,043</b>  | \$5,487,087 ... \$12,340,999 | computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket |
| 2017        | \$7,723,542  | \$407,501         | <b>\$7,316,040</b>  | \$4,106,083 ... \$10,525,998 | computed                                                                                                                           |
| 2018        | \$10,684,546 | \$375,000         | <b>\$10,309,545</b> | \$5,048,091 ... \$15,570,999 | computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket |

|      |              |           |                     |                                 |                                                                                                                                    |
|------|--------------|-----------|---------------------|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| 2019 | \$8,696,022  | \$375,000 | <b>\$8,321,022</b>  | \$4,051,045 ...<br>\$12,590,999 | computed                                                                                                                           |
| 2020 | \$13,735,024 | \$375,000 | <b>\$13,360,024</b> | \$5,345,049 ...<br>\$21,374,999 | computed                                                                                                                           |
| 2021 | \$9,827,525  | \$375,000 | <b>\$9,452,524</b>  | \$4,730,050 ...<br>\$14,174,999 | computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket |
| 2022 | \$8,610,525  | \$375,000 | <b>\$8,235,524</b>  | \$3,845,050 ...<br>\$12,625,999 | computed                                                                                                                           |
| 2023 | \$8,514,517  | \$375,000 | <b>\$8,139,516</b>  | \$3,933,034 ...<br>\$12,345,999 | computed; 2 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket |
| 2024 | \$10,954,522 | \$375,000 | <b>\$10,579,522</b> | \$4,474,044 ...<br>\$16,684,999 | computed                                                                                                                           |
| 2025 | \$11,719,524 | \$750,001 | <b>\$10,969,524</b> | \$4,504,049 ...<br>\$17,434,998 | computed                                                                                                                           |

- **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.

YEARS ESTIMATED

AVG. ANNUAL  
CHANGE  
(GEOMETRIC, EST.)  
**-21.2%**

SIMPLE AVERAGE OF  
YEARS  
**-17.4%**

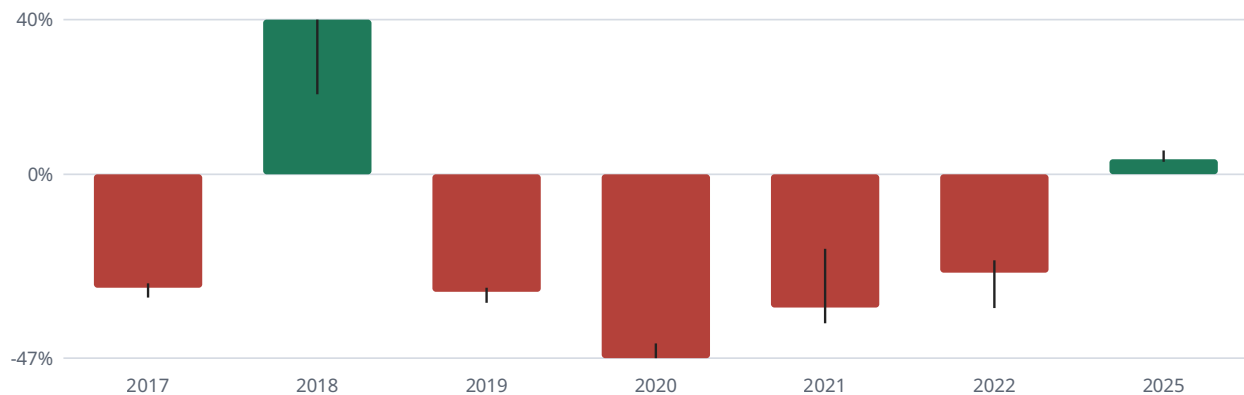
**7**

BEST / WORST  
SINGLE YEAR  
**2018 +40%**  
**2020 -47%**

**Reliability flags:** 5 unparsed value(s).

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): -25.1% to -19.8%. 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 | Sta |
|----------------|---------------------|---------------------|--------------|-------------|-------------|-----------|--------------------|-----------------|-----------------|-----|
| 2016→2017      | \$6,244,535         | \$4,561,530         | \$120,121    | \$376,009   | \$130,002   | -29.0%    | -31.5% ... -27.9%  | -104% ... +46%  | 73%             | cou |
| 2017→2018      | \$7,042,538         | \$9,750,038         | \$165,926    | \$105,502   | \$16,001    | +39.5%    | +20.4% ... +47.7%  | -69% ... +149%  | 91%             | cou |
| 2018→2019      | \$10,318,542        | \$7,147,518         | \$74,626     | \$0         | \$0         | -30.0%    | -32.9% ... -29.0%  | -114% ... +54%  | 97%             | cou |
| 2019→2020      | \$8,621,022         | \$4,535,011         | \$32,456     | \$1,021,505 | \$1,023,504 | -47.0%    | -57.7% ... -43.2%  | -136% ... +42%  | 99%             | cou |
| 2020→2021      | \$13,619,523        | \$8,954,022         | \$30,604     | \$0         | \$0         | -34.0%    | -38.1% ... -19.1%  | -123% ... +55%  | 99%             | cou |

|           |              |              |           |             |             |        |                         |                    |      |                                                                                                      |
|-----------|--------------|--------------|-----------|-------------|-------------|--------|-------------------------|--------------------|------|------------------------------------------------------------------------------------------------------|
| 2021→2022 | \$9,077,524  | \$8,602,524  | \$108,958 | \$8,175,006 | \$6,257,508 | -25.2% | -34.2%<br>...<br>-22.0% | -198% ...<br>+148% | 100% | cou<br>hig<br>turn<br>(bu<br>> 1<br>ope<br>val                                                       |
| 2022→2023 | \$2,036,510  | \$3,602,509  | \$39,752  | \$1,987,506 | \$738,006   | +17.5% | +15.0%<br>...<br>+23.5% | -143% ...<br>+178% | 24%  | exc<br>not<br>elig<br>tra<br>cov<br>24<br>60<br>turn<br>(bu<br>> 1<br>ope<br>val<br>ma<br>exi<br>pos |
| 2023→2024 | \$0          | \$0          | \$0       | \$0         | \$0         | n/a    | n/a ...<br>n/a          | n/a ...<br>n/a     | 0%   | exc<br>not<br>elig<br>tra<br>pri<br>val<br>bel<br>\$5                                                |
| 2024→2025 | \$10,197,020 | \$10,455,520 | \$130,856 | \$0         | \$0         | +3.8%  | +3.2%<br>...<br>+6.1%   | -109% ...<br>+116% | 93%  | cou                                                                                                  |

## 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 |
|-------------|--------|------|-------|-----------------|--------------------------|------------------------------------|
|-------------|--------|------|-------|-----------------|--------------------------|------------------------------------|

|      |          |                 |           |     |   |                                                                                                                  |
|------|----------|-----------------|-----------|-----|---|------------------------------------------------------------------------------------------------------------------|
| 2016 | 10014297 | House amendment | 12/5/2016 | 89  | 1 | <a href="#">10014297.pdf</a><br>bdda9a3e0bc1a8<br>fe7789aa67f7d11<br>8958d624f84e945<br>2af3e1fcae82c0<br>d18ccd |
| 2017 | 10028897 | House amendment | 8/7/2019  | 99  | 0 | <a href="#">10028897.pdf</a><br>32e00f0757d5b2<br>e824df80ebdc9d<br>a8befb897caeca7<br>7486ad81cb14815<br>72030e |
| 2018 | 10028899 | House amendment | 8/7/2019  | 102 | 1 | <a href="#">10028899.pdf</a><br>2abade66a6a35d<br>b56f7dce5360712<br>f08dda2c7a1c149<br>406aab79c902f3<br>ef1074 |
| 2019 | 10035615 | House annual    | 8/4/2020  | 97  | 0 | <a href="#">10035615.pdf</a><br>7a7143ebee5e190<br>d87d85a091692d6<br>0bd06336e508282<br>9202d8ca2a33b74<br>3726 |
| 2020 | 10041776 | House annual    | 8/10/2021 | 92  | 0 | <a href="#">10041776.pdf</a><br>be1155960203583<br>b2c06ed4d5a7c9<br>bdce25083c0bf53<br>a6da1e088400db5<br>73629 |
| 2021 | 10047738 | House annual    | 6/21/2022 | 52  | 1 | <a href="#">10047738.pdf</a><br>c62b4eeb551cc62<br>22045b2ff0afa7<br>e76b4dd7d99f8f<br>df79dcff38ddb5<br>a25af29 |
| 2022 | 10053194 | House annual    | 5/11/2023 | 54  | 0 | <a href="#">10053194.pdf</a><br>dd000c1910362d7<br>37b7bb0702d9b7<br>d8723f0e4056610<br>84f4a6a8016c7b0<br>14028 |

|      |                                          |                  |            |    |   |                                                                                                                           |
|------|------------------------------------------|------------------|------------|----|---|---------------------------------------------------------------------------------------------------------------------------|
| 2023 | 10060198                                 | House<br>annual  | 5/14/2024  | 39 | 2 | <a href="#">10060198.pdf</a><br>5051fd0619ad08<br>c6567af492eb8e<br>e72123ef45b4eb3<br>fb5dbde9644b76<br>f4895da          |
| 2024 | 8b27a178-5d21-4754-9f85-<br>ff6471d75dea | Senate<br>annual | 05/15/2025 | 44 | 0 | <a href="#">Senate eFD<br/>report</a><br>09a738995acd0e5<br>cb703e4a29f0957<br>5e272e0ac6ccea7<br>b216d7feea00e63<br>1215 |
| 2025 | a1efffdb-c810-48e4-<br>ac20-08c77313fc71 | Senate<br>annual | 05/15/2026 | 49 | 0 | <a href="#">Senate eFD<br/>report</a><br>f89ecc7fee3f2d1<br>c88624df7ae3275<br>32c0a9d23ea0d8<br>f5b61c7fb2c3791<br>3f80c |

## Largest movers 2020→2021

| Position (as written in filing)                                                                  | Owner | Kind | Opening<br>range(s)          | Closing<br>range(s)        | Buys<br>(mid) | Sales<br>(mid) |
|--------------------------------------------------------------------------------------------------|-------|------|------------------------------|----------------------------|---------------|----------------|
| LISA BLUNT ROCHESTER REV TST UA Apr<br>02,2015 LISA BLUNT ROCHESTER TR ⇒<br>DODGE & COX FUNDS IN | —     | held | \$1,000,001 -<br>\$5,000,000 | \$500,001 -<br>\$1,000,000 | \$0           | \$0            |
| LISA BLUNT ROCHESTER REV TST UA Apr<br>02,2015 LISA BLUNT ROCHESTER TR ⇒<br>Vanguard Total Bond  | —     | held | \$1,000,001 -<br>\$5,000,000 | \$500,001 -<br>\$1,000,000 | \$0           | \$0            |
| LISA BLUNT ROCHESTER REV TST UA Apr<br>02,2015 LISA BLUNT ROCHESTER TR ⇒<br>iShares Russell Mid- | —     | held | \$100,001 -<br>\$250,000     | \$250,001 -<br>\$500,000   | \$0           | \$0            |
| LISA BLUNT ROCHESTER REV TST UA Apr<br>02,2015 LISA BLUNT ROCHESTER TR ⇒<br>JPMORGAN FUNDS EMRG  | —     | held | \$250,001 -<br>\$500,000     | \$100,001 -<br>\$250,000   | \$0           | \$0            |
| LISA BLUNT ROCHESTER REV TST UA Apr<br>02,2015 LISA BLUNT ROCHESTER TR ⇒<br>iShares Core MSCI Em | —     | held | \$250,001 -<br>\$500,000     | \$100,001 -<br>\$250,000   | \$0           | \$0            |
| LISA BLUNT ROCHESTER IRA ⇒ ISHARES<br>CORE S&P MCP ETF (IJH) [EF]                                | —     | held | \$15,001 -<br>\$50,000       | \$50,001 -<br>\$100,000    | \$0           | \$0            |

|                                                                              |   |      |                        |                        |     |     |
|------------------------------------------------------------------------------|---|------|------------------------|------------------------|-----|-----|
| LISA BLUNT ROCHESTER IRA ⇒<br>VANGUARD HIGH YIELD CORP ADMIRAL<br>VWEAX [MF] | — | held | \$15,001 -<br>\$50,000 | \$1,001 -<br>\$15,000  | \$0 | \$0 |
| LISA BLUNT ROCHESTER ROTH IRA ⇒<br>Vanguard S&P 500 ETF (VOO) [EF]           | — | held | \$1,001 -<br>\$15,000  | \$15,001 -<br>\$50,000 | \$0 | \$0 |

## Largest movers 2021→2022

| Position (as written in filing)                                                                     | Owner | Kind | Opening<br>range(s)        | Closing<br>range(s)        | Buys (mid)  | Sales<br>(mid) |
|-----------------------------------------------------------------------------------------------------|-------|------|----------------------------|----------------------------|-------------|----------------|
| LISA BLUNT ROCHESTER REV TST<br>UA Apr 02,2015 LISA BLUNT<br>ROCHESTER TR ⇒ Vanguard Total<br>Bond  | —     | held | \$500,001 -<br>\$1,000,000 | \$500,001 -<br>\$1,000,000 | \$2,250,002 | \$750,000      |
| LISA BLUNT ROCHESTER REV TST<br>UA Apr 02,2015 LISA BLUNT<br>ROCHESTER TR ⇒                         | —     | new  | —                          | \$500,001 -<br>\$1,000,000 | \$175,000   | \$175,000      |
| LISA BLUNT ROCHESTER REV TST<br>UA Apr 02,2015 LISA BLUNT<br>ROCHESTER TR ⇒ DODGE & COX<br>FUNDS IN | —     | held | \$500,001 -<br>\$1,000,000 | \$500,001 -<br>\$1,000,000 | \$750,000   | \$75,000       |
| LISA BLUNT ROCHESTER REV TST<br>UA Apr 02,2015 LISA BLUNT<br>ROCHESTER TR ⇒ iShares Core MSCI<br>EA | —     | new  | —                          | \$100,001 -<br>\$250,000   | \$550,001   | \$0            |
| LISA BLUNT ROCHESTER REV TST<br>UA Apr 02,2015 LISA BLUNT<br>ROCHESTER TR ⇒ WCM FOCUSED<br>INTL GRO | —     | held | \$250,001 -<br>\$500,000   | \$100,001 -<br>\$250,000   | \$0         | \$0            |
| LISA BLUNT ROCHESTER REV TST<br>UA Apr 02,2015 LISA BLUNT<br>ROCHESTER TR ⇒ AMERICAN<br>FUNDS EUROP | —     | held | \$250,001 -<br>\$500,000   | \$100,001 -<br>\$250,000   | \$0         | \$0            |
| LISA BLUNT ROCHESTER REV TST<br>UA Apr 02,2015 LISA BLUNT<br>ROCHESTER TR ⇒ Vanguard FTSE<br>Emergi | —     | new  | —                          | None                       | \$175,000   | \$350,001      |
| Inter-Family Promissory Note [DO]                                                                   | —     | held | \$100,001 -<br>\$250,000   | None                       | \$0         | \$0            |

## Largest movers 2024→2025

| Position (as written in filing)                                                    | Owner | Kind | Opening range(s)      | Closing range(s)      | Buys (mid) | Sales (mid) |
|------------------------------------------------------------------------------------|-------|------|-----------------------|-----------------------|------------|-------------|
| Lisa Blunt Rochester Revocable Trust ⇒ IWR - iShares Russell Mid-Cap ETF           | —     | held | \$100,001 - \$250,000 | \$250,001 - \$500,000 | \$0        | \$0         |
| Lisa Blunt Rochester Revocable Trust ⇒ VUG - Vanguard Growth ETF                   | —     | held | \$100,001 - \$250,000 | \$50,001 - \$100,000  | \$0        | \$0         |
| Lisa Blunt Rochester Revocable Trust ⇒ DFSCX - Dfa U.S. Micro Cap Portfolio        | —     | held | \$15,001 - \$50,000   | \$50,001 - \$100,000  | \$0        | \$0         |
| Donor Advised Fund ⇒ VEA - Vanguard FTSE Developed Markets ETF                     | —     | held | \$15,001 - \$50,000   | \$50,001 - \$100,000  | \$0        | \$0         |
| Charles Schwab Roth IRA ⇒ VEA - Vanguard FTSE Developed Markets ETF                | —     | held | \$1,001 - \$15,000    | \$15,001 - \$50,000   | \$0        | \$0         |
| Charles Schwab IRA ⇒ Charles Schwab (Wilmington, DE) Type: Brokerage Sweep Account | —     | held | \$1,001 - \$15,000    | \$15,001 - \$50,000   | \$0        | \$0         |
| Charles Schwab IRA ⇒ IEMG - iShares Core MSCI Emerging Markets ETF                 | —     | held | \$1,001 - \$15,000    | \$15,001 - \$50,000   | \$0        | \$0         |
| Lisa Blunt Rochester Revocable Trust ⇒ IJR - iShares Core S&P Small-Cap ETF        | —     | held | \$100,001 - \$250,000 | \$100,001 - \$250,000 | \$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  $\pm 100\%$ .

- 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  $t-1 \rightarrow t$  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.