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GPO Member Guide)

Rep. Joe Courtney (D-CT)

House · Democrat (most recent term) · CT-2 · in Congress 2007–present ·
Bioguide ID C001069

Party history: D 2007–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 at the earliest available report (2013); the member entered office earlier, in 2007	2013	\$117,028	\$461,014	\$804,999
(b) Latest net worth estimate	2025	\$806,077	\$1,798,538	\$2,791,000
(c) Estimated gain / loss, nominal dollars, 2013 → 2025 (12 years spanned)	2013– 2025	+\$1,078	+ \$1,337,525	+ \$2,673,972

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

Reliability flags (net worth): 2025: 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
2013	\$536,014	\$75,000	\$461,014	\$117,028 ... \$804,999	computed
2014	\$619,015	\$75,000	\$544,014	\$168,030 ... \$919,999	computed
2015	\$685,018	\$75,000	\$610,018	\$195,036 ... \$1,024,999	computed
2016	\$549,012	\$120,001	\$429,010	\$102,023 ... \$755,998	computed
2017	\$938,514	\$32,500	\$906,014	\$461,029 ... \$1,350,999	computed

2018	\$987,022	\$32,500	\$954,522	\$392,045 ... \$1,516,999	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2019	\$1,449,052	\$32,500	\$1,416,552	\$431,105 ... \$2,401,999	computed
2020	\$1,379,534	\$12,500	\$1,367,034	\$598,068 ... \$2,136,000	computed
2021	\$1,587,534	\$0	\$1,587,534	\$739,067 ... \$2,436,000	computed
2022	\$1,554,536	\$0	\$1,554,536	\$702,073 ... \$2,407,000	computed
2023	\$1,729,536	\$0	\$1,729,536	\$805,072 ... \$2,654,000	computed
2024	\$1,896,040	\$0	\$1,896,040	\$851,080 ... \$2,941,000	computed
2025	\$1,798,538	\$0	\$1,798,538	\$806,077 ... \$2,791,000	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket

- **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.)

-9.4%

SIMPLE AVERAGE OF
YEARS

-6.4%

YEARS ESTIMATED

11

BEST / WORST
SINGLE YEAR

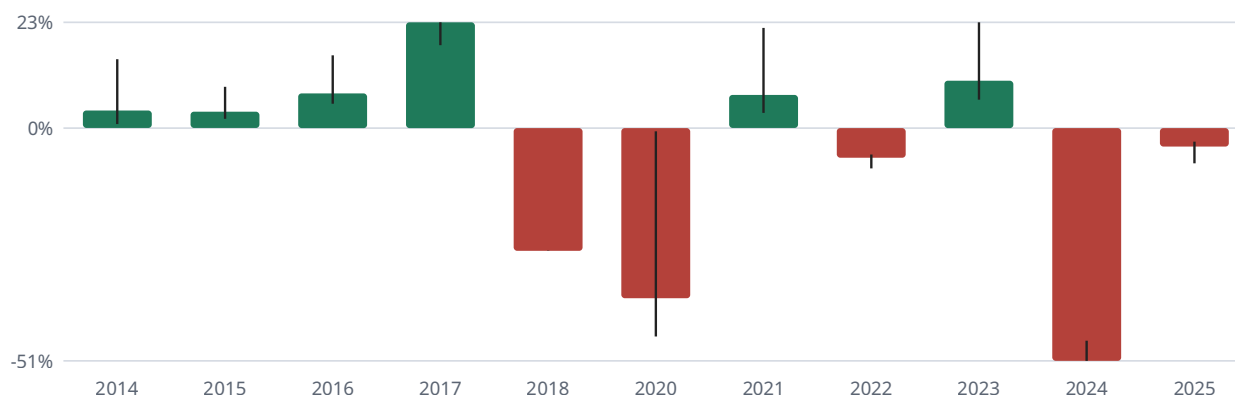
2017 +23%

2024 -51%

Reliability flags: 2 unparsed value(s).

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +0.1% to -12.2%. 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	Status / flags
2013→2014	\$512,012	\$546,512	\$1,201	\$24,002	\$8,000	+3.8%	+0.9% ... +15.1%	-118% ... +126%	96%	counted
2014→2015	\$538,013	\$588,514	\$1,302	\$48,502	\$16,001	+3.6%	+2.0% ... +9.1%	-120% ... +127%	87%	counted
2015→2016	\$685,018	\$541,011	\$802	\$0	\$195,506	+7.6%	+5.3% ... +16.0%	-107% ... +122%	100%	counted
2016→2017	\$442,009	\$543,508	\$1,402	\$0	\$0	+23.3%	+18.2% ... +39.2%	-85% ... +131%	81%	counted

2017→2018	\$823,013	\$683,514	\$201	\$439,510	\$356,504	-27.0%	-27.0% ... -27.0%	-166% ... +112%	88%	counted; many new exited positions
2018→2019	\$545,514	\$1,038,534	\$1,106	\$425,522	\$8,000	+14.0%	+10.7% ... +26.6%	-229% ... +257%	60%	excluded; not eligible; traced coverage 60% < 60%; many new/exited positions
2019→2020	\$1,030,032	\$854,514	\$802	\$251,510	\$40,501	-37.4%	-45.9% ... -0.7%	-158% ... +83%	71%	counted
2020→2021	\$1,100,030	\$1,291,528	\$1,603	\$265,512	\$152,508	+7.3%	+3.3% ... +22.1%	-143% ... +157%	80%	counted
2021→2022	\$1,251,527	\$1,159,528	\$1,204	\$144,009	\$153,006	-6.5%	-8.9% ... -5.8%	-133% ... +120%	79%	counted
2022→2023	\$1,030,027	\$1,239,028	\$2,407	\$120,008	\$16,001	+10.4%	+6.3% ... +25.9%	-124% ... +145%	66%	counted
2023→2024	\$1,527,530	\$1,766,536	\$3,312	\$1,415,538	\$390,011	-51.3%	-52.7% ... -46.8%	-237% ... +135%	88%	counted; high turnover (buys+se > 100% of opening value); many new exited positions
2024→2025	\$1,731,536	\$1,602,035	\$4,861	\$535,520	\$590,024	-4.1%	-7.8% ... -3.0%	-156% ... +148%	91%	counted

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
2013	10001044	House annual	5/15/2014	34	0	10001044.pdf 1c22471935d6b5d231730d092c35b8a1ccc4e9dedf656fa62a1e16353f213c91
2014	10005904	House annual	5/12/2015	30	0	10005904.pdf b9961893f9abd8f313ed97c1c41a888291d47c753fbba4017206a38ac537315a
2015	10010927	House annual	5/10/2016	36	0	10010927.pdf fbc6aee6eda4a1e3afd58774805688280d6274a69a66ab6018e9811437acfbbc
2016	10015965	House annual	5/4/2017	37	0	10015965.pdf 3f51cd4122ee5100b90bd3d752d2a7d313d2293b02f8027e9cf1c6fbdbbb3749
2017	10022700	House annual	5/15/2018	30	0	10022700.pdf 67fa5297a0c239714e1358d7cb2d611ad3ccdf25c5ef73763ae15c8004804ec0
2018	10026065	House annual	5/10/2019	54	1	10026065.pdf eaa881a6a498d184942166fef9d29e7025ef3949a9d8a27b6ad3052557fa6c547
2019	10036670	House annual	8/5/2020	105	0	10036670.pdf 51babc202fbac401a5f57f3bba867345cab88d4bb85a8c09452f953c65bf4039
2020	10041890	House annual	7/30/2021	151	0	10041890.pdf e7bc46e47f32cd3c584d2e979bcb2071892a79fd64d16c5241211644ca99fa4f
2021	10047631	House annual	5/13/2022	78	0	10047631.pdf 9ca8dd3d9b9e07dbc80570add1b3b2afe415e8f19f0eb27a9aa2af712776b8fc

2022	10052464	House annual	5/9/2023	80	0	10052464.pdf 4548ce9ce1e23095877bfa7b6c0 e0a124f87c8100c7571b94416050 f62465767
2023	10057521	House annual	5/13/2024	88	0	10057521.pdf 6a18d8b7bd1b82a26bb194ced669 d21c5428f0a457757e21402c720 ed5300e2f
2024	10067873	House annual	5/14/2025	133	0	10067873.pdf 7e6cf65c784272e70681ea61d7e8 03bccd85a44c90ec71ccae8e146 cb2c67b10
2025	10076814	House annual	5/14/2026	94	1	10076814.pdf dd3818aa3ba1054b1b3efb9cbd9 b6865b5bed2697138b711c5f3d98 afcbb1a4d

Largest movers 2022→2023

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
IRA ⇒ TIAA CREF Core Impact [EF]	—	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0
Inherited Brokerage Account ⇒ iShares Core S&P 500 - IVV [MF]	SP	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
M&T Bank Accounts [BA]	—	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0
Rollover IRA ⇒ TIAA CREF Core Impact [MF]	SP	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
IRA ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]	—	new	—	\$15,001 - \$50,000	\$8,000	\$8,000
Inherited Brokerage Account ⇒ Blackrock International Fund [MF]	SP	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
Inherited Brokerage Account ⇒ Pimco Municipal Bond Fund - PMUPX [MF]	SP	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
Inherited Brokerage Account ⇒ Blackrock Technologies Opportunity Fund - BGSIX [MF]	SP	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$0

Largest movers 2023→2024

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
IRA ⇒ TIAA CREF Core Impact [EF]	—	held	\$100,001 - \$250,000	None	\$0	\$0
IRA ⇒ Calvert US Large Cap Value [EF]	—	held	\$50,001 - \$100,000	None	\$0	\$0
Rollover IRA ⇒ TIAA CREF Core Impact [MF]	SP	held	\$50,001 - \$100,000	None	\$0	\$0
IRA ⇒ Nuveen ESG Large Cap Value [MF]	—	held	\$50,001 - \$100,000	None	\$0	\$0
M&T Bank Accounts [BA]	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
IRA ⇒	—	held	\$15,001 - \$50,000	None	\$8,000	\$0
Inherited Brokerage Account ⇒ Blackrock International Fund [MF]	SP	held	\$15,001 - \$50,000	None	\$0	\$0
IRA ⇒ CCM Community Impact Fund [EF]	—	held	\$15,001 - \$50,000	None	\$0	\$0

Largest movers 2024→2025

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
M&T Bank Accounts [BA]	—	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0
IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	—	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$81,002	\$40,501
Rollover IRA ⇒ Calvert US Large Cap Value [MF]	SP	held	\$15,001 - \$50,000	None	\$0	\$0
IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	—	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$8,000
Inherited Brokerage Account ⇒	SP	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$8,000	\$8,000
Inherited Brokerage Account ⇒ State Street Consumer Discretionary Select Sector SPDR ETF (	SP	new	—	\$1,001 - \$15,000	\$8,000	\$24,002

Rollover IRA ⇒ iShares ESG Aware USD Corporate Bond ETF (SUSC) [EF]	SP	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$8,000
IRA ⇒ JPMorgan Core Plus Bond ETF (JCPB) [EF]	—	held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$16,001	\$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.