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GPO Member Guide)

Rep. Katherine M. Clark (D-MA)

House · Democrat (most recent term) · MA-5 · in Congress 2013–present ·
Bioguide ID C001101

Party history: D 2013–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 2013, the member's first year in office)	2013	\$1,254,137	\$2,944,568	\$4,635,000
(b) Latest net worth estimate	2025	\$5,822,057	\$13,277,028	\$20,731,998
(c) Estimated gain / loss, nominal dollars, 2013 → 2025 (12 years spanned)	2013– 2025	+ \$1,187,057	+ \$10,332,459	+ \$19,477,861

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
2013	\$2,944,568	\$0	\$2,944,568	\$1,254,137 ... \$4,635,000	computed
2014	\$3,762,079	\$0	\$3,762,079	\$1,714,158 ... \$5,810,000	computed
2015	\$3,307,551	\$0	\$3,307,551	\$1,740,102 ... \$4,875,000	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2016	\$3,540,066	\$0	\$3,540,066	\$1,769,133 ... \$5,311,000	computed

2017	\$4,896,558	\$375,000	\$4,521,558	\$2,187,117 ... \$6,855,999	computed
2018	\$7,179,060	\$375,000	\$6,804,059	\$2,677,119 ... \$10,930,999	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2019	\$8,564,566	\$0	\$8,564,566	\$4,033,133 ... \$13,096,000	computed
2020	\$10,468,062	\$375,000	\$10,093,062	\$4,871,125 ... \$15,314,999	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2021	\$10,675,033	\$1,175,002	\$9,500,030	\$4,150,066 ... \$14,849,995	computed
2022	\$10,658,034	\$2,600,003	\$8,058,031	\$2,215,068 ... \$13,900,994	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2023	\$11,602,034	\$925,001	\$10,677,033	\$5,069,068 ... \$16,284,998	computed
2024	\$13,907,530	\$925,001	\$12,982,529	\$5,640,060 ... \$20,324,998	computed; 2 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2025	\$14,202,028	\$925,001	\$13,277,028	\$5,822,057 ... \$20,731,998	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.

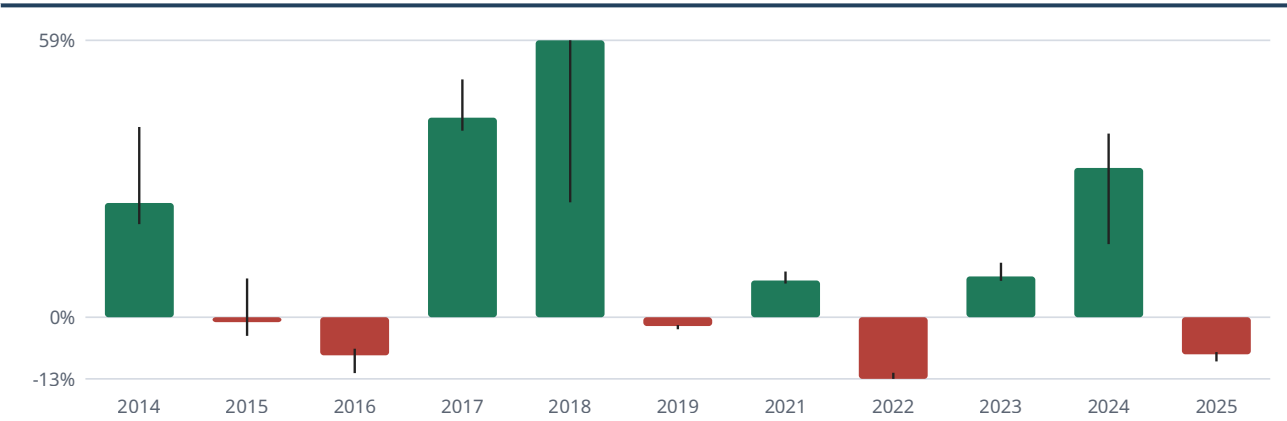
Read this first. Members report asset values only as *ranges* (e.g. "\$15,001 – \$50,000"), never exact dollars. Every figure below is an **estimate** computed from range midpoints, not a measured return. Figures cannot be interpreted as investment performance, and they do not show wrongdoing or skill. 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.

AVG. ANNUAL CHANGE (GEOMETRIC, EST.) +10.9%	SIMPLE AVERAGE OF YEARS +12.9%	YEARS ESTIMATED 11	BEST / WORST SINGLE YEAR 2018 +59% 2022 -13%
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Reliability flags: 1 year(s) driven by income/one position/range artefact; 6 unparsed value(s).

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +9.1% to +11.6%. 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	Stat flag
2013→2014	\$2,735,060	\$3,359,562	\$169,872	\$617,036	\$489,028	+24.4%	+19.8% ... +40.6%	-133% ... +181%	93%	coun man new exite posi

2014→2015	\$3,179,059	\$2,981,040	\$33,022	\$282,003	\$413,509	-1.1%	-4.0% ... +8.3%	-109% ... +107%	85%	coun
2015→2016	\$2,974,540	\$2,863,557	\$84,966	\$320,020	\$104,505	-8.1%	-11.9% ... -6.7%	-117% ... +101%	92%	coun man new exite posi
2016→2017	\$2,776,548	\$4,463,048	\$203,364	\$758,001	\$48,502	+42.5%	+39.7% ... +50.7%	-91% ... +176%	78%	coun
2017→2018	\$4,278,540	\$6,626,042	\$177,410	\$113,502	\$113,502	+59.0%	+24.5% ... +73.0%	-74% ... +192%	87%	coun sing posi driv the (ran jump
2018→2019	\$5,319,520	\$5,195,020	\$33,506	\$104,505	\$96,006	-1.9%	-2.6% ... -1.7%	-115% ... +111%	76%	coun man new exite posi
2019→2020	\$4,770,018	\$5,961,017	\$40,158	\$8,000	\$48,502	+26.7%	+23.1% ... +39.8%	-98% ... +151%	56%	excl not eligi trac cove 56% 60%
2020→2021	\$7,573,023	\$8,142,024	\$78,714	\$286,004	\$231,004	+7.8%	+7.2% ... +9.7%	-98% ... +114%	78%	coun
2021→2022	\$9,809,531	\$8,452,029	\$61,769	\$32,500	\$40,501	-13.1%	-16.7% ... -11.8%	-104% ... +77%	92%	coun
2022→2023	\$6,714,024	\$7,358,023	\$113,766	\$175,000	\$0	+8.7%	+7.8% ... +11.6%	-101% ... +118%	65%	coun
2023→2024	\$7,758,028	\$10,584,527	\$191,620	\$725,014	\$175,000	+31.8%	+15.6% ... +39.1%	-76% ... +140%	67%	coun
2024→2025	\$13,385,027	\$13,386,526	\$188,918	\$1,556,017	\$306,004	-7.9%	-9.4% ... -7.4%	-117% ... +101%	98%	coun

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	10008646	House amendment	9/17/2015	137	0	10008646.pdf 14f686a7a338d3e77a12f405d13b05929fc155ac54f4d4dbdc27a297c50064c
2014	10008647	House amendment	10/5/2015	175	0	10008647.pdf 4e289f7008e03e1674720479cb72b325e25efc7af3eb9ed5e7d3d28e3a99ccf2
2015	10010213	House annual	8/12/2016	136	1	10010213.pdf 6089d115ec908853271a48fdcf0c12d8976e852ece5891c7a9c94bffccaa3395
2016	10016774	House annual	8/7/2017	134	0	10016774.pdf 3ed75b35eae24d4071fe958b22bf7457b4509949ec1c78a323a54822bd069749
2017	10021314	House annual	5/11/2018	118	0	10021314.pdf 51b7bcbcb6978f0c8f14a15fd37bcdc94378e58a8cdec1f46ac03d37b5a9ddb08
2018	10026936	House annual	7/31/2019	120	1	10026936.pdf a5599064e86ca2be26d1542820a1bad0c457d110fafe9b7d7e35b0e11a95fc4c
2019	10037757	House annual	8/12/2020	134	0	10037757.pdf b7b8c6b0250509c4ac75c43ad87b42433bbd8462c5bbae83db3b5af6ba6292b5
2020	10050066	House amendment	8/12/2022	126	1	10050066.pdf 65367e681b7e748da070a150a794d7ade35dac3e435faeac1cfb99b4e059070b

2021	10046913	House annual	8/12/2022	67	0	10046913.pdf 3b2a794c997d8a2f7abe0015 bef5330766503049d68af675 b73acc640527c1e3
2022	10052322	House annual	6/8/2023	73	1	10052322.pdf 73c598eca567d03035bca2ae6 c8f264ff03f6c51031a520b1 ba9e4331b1d60db
2023	10059034	House annual	5/14/2024	72	0	10059034.pdf d69ff16a0e8e78a728ae21ca d55321aa592a27839ae5dda91 07ddd4aa0d5332b
2024	10066244	House annual	5/15/2025	65	2	10066244.pdf 42bbfa2c5567d5e394fe1b43 df8f21719a820f93946442cd f149f9ea2eaf3f7c
2025	10075831	House annual	5/15/2026	67	0	10075831.pdf 70658b0599e28a1fe96e2906 ac6fc74640c5951883e1e3d07 7f20e5f5353bee2

Largest movers 2022→2023

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Judith S. Clark Irrevocable Trust ⇒ Apple Inc. (AAPL) [ST]	—	held	\$250,001 - \$500,000	\$500,001 - \$1,000,000	\$0	\$0
Eastern Bank Account [BA]	JT	held	\$100,001 - \$250,000	\$15,001 - \$50,000	\$0	\$0
Katherine M. Clark Separate Share Trust ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	—	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0
Judith S. Clark Irrevocable Trust ⇒ Microsoft Corporation (MSFT) [ST]	—	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0
Judith S. Clark Irrevocable Trust ⇒ Cisco Systems, Inc. (CSCO) [ST]	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Judith S. Clark Irrevocable Trust ⇒ JP Morgan Chase & Co. (JPM) [ST]	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Katherine M. Clark Separate Share Trust ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0

Capital One Savings Account [BA]	JT	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0
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Largest movers 2023→2024

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Judith S. Clark Irrevocable Trust ⇒ SPDR S&P 500 (SPY) [EF]	—	held	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$0	\$0
Judith S. Clark Irrevocable Trust ⇒ Fidelity Cash Reserves (FDRXX) [MF]	—	held	\$50,001 - \$100,000	\$500,001 - \$1,000,000	\$0	\$0
Judith S. Clark Irrevocable Trust ⇒ United States Treasury Notes [GS]	—	held	\$250,001 - \$500,000	None	\$0	\$0
Katherine M. Clark Separate Share Trust ⇒ United States Treasury Notes [GS]	—	held	\$250,001 - \$500,000	None	\$0	\$0
Fidelity Brokerage Account ⇒ United States Treasury Notes [GS]	JT	held	\$250,001 - \$500,000	\$100,001 - \$250,000	\$175,000	\$0
Katherine M. Clark Separate Share Trust ⇒ Fidelity - Cash [BA]	—	held	\$1,001 - \$15,000	\$250,001 - \$500,000	\$0	\$0
Katherine M. Clark Separate Share Trust ⇒ Apple Inc. (AAPL) [ST]	—	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Katherine M. Clark Separate Share Trust ⇒ SPDR S&P 500 (SPY) [EF]	—	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0

Largest movers 2024→2025

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Judith S. Clark Irrevocable Trust ⇒ Fidelity Cash Reserves (FDRXX) [MF]	—	held	\$500,001 - \$1,000,000	\$100,001 - \$250,000	\$0	\$0
Katherine M. Clark Separate Share Trust ⇒ Fidelity - Cash [BA]	—	held	\$250,001 - \$500,000	\$1 - \$1,000	\$0	\$0
Katherine Clark - Traditional IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]	—	held	\$250,001 - \$500,000	\$100,001 - \$250,000	\$0	\$0
Judith S. Clark Irrevocable Trust ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	—	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0

Fidelity Rollover IRA ⇒ United States Treasury Notes [GS]	SP	held	None; \$100,001 - \$250,000	None	\$0	\$0
Fidelity Brokerage Account ⇒ United States Treasury Notes [GS]	JT	held	\$100,001 - \$250,000	None	\$0	\$0
Katherine M. Clark Exempt Trust ⇒ Fidelity Cash Reserves (FDRXX) [MF]	—	held	\$100,001 - \$250,000	\$15,001 - \$50,000	\$0	\$0
Katherine M. Clark Separate Share Trust ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	—	held	\$50,001 - \$100,000	\$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 ±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.