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GPO Member Guide)

Rep. Jeff Fortenberry (R-NE)

House · Republican (most recent term) · NE-1 · in Congress 2005–2022 ·
Bioguide ID F000449

Party history: R 2005–2022. 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 2005	2013	– \$5,045,993	– \$2,467,999	\$109,995
(b) Latest net worth estimate	2020	– \$4,330,991	– \$22,998	\$4,284,995
(c) Estimated gain / loss, nominal dollars, 2013 → 2020 (7 years spanned)	2013– 2020	– \$4,440,986	+ \$2,445,001	+ \$9,330,988

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	\$1,032,004	\$3,500,002	– \$2,467,999	–\$5,045,993 ... \$109,995	computed
2014	\$3,320,506	\$3,325,002	– \$4,496	–\$4,298,989 ... \$4,289,996	computed
2015	\$16,070,506	\$3,877,504	\$12,193,002	–\$563,988 ... \$24,949,993	computed
2016	\$15,353,006	\$3,877,504	\$11,475,502	–\$1,048,988 ... \$23,999,993	computed
2017	\$3,314,504	\$3,877,504	– \$563,000	–\$5,045,992 ... \$3,919,993	computed

2018	\$3,304,504	\$3,470,002	-\$165,498	-\$4,515,991 ... \$4,184,995	computed
2019	\$3,347,004	\$3,370,002	-\$22,998	-\$4,330,991 ... \$4,284,995	computed
2020	\$3,347,004	\$3,370,002	-\$22,998	-\$4,330,991 ... \$4,284,995	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.)

-38.5%

SIMPLE AVERAGE OF
YEARS

-23.9%

YEARS ESTIMATED

3

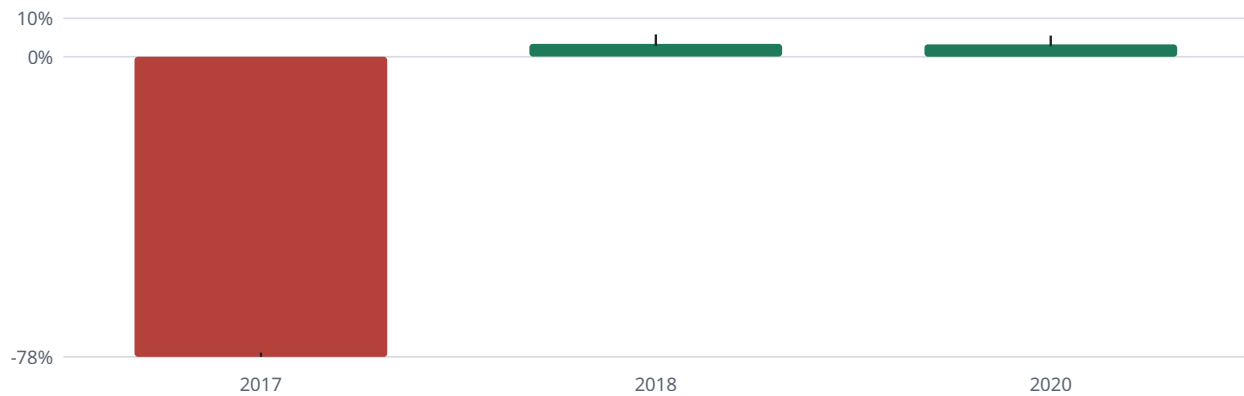
BEST / WORST
SINGLE YEAR

2018 +3%
2017 -78%

Reliability flags: few years (3); 1 year(s) driven by income/one position/range artefact.

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): -36.5% to -38.9%. 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	\$199,002	\$296,504	\$10,101	\$97,502	\$0	+5.1%	+4.9% ... +5.2%	-147% ... +157%	19%	excluded; not eligible: traced coverage 19% < 60%; many new/exited positions
2014→2015	\$137,504	\$137,504	\$32,601	\$0	\$0	+23.7%	+22.3% ... +30.0%	-116% ... +164%	4%	excluded; not eligible: traced coverage 4% < 60%
2015→2016	\$312,504	\$312,504	\$65,102	\$0	\$0	+20.8%	+20.0% ... +21.1%	-94% ... +136%	2%	excluded; not eligible: traced coverage 2% < 60%

2016→2017	\$15,345,006	\$3,239,504	\$107,602	\$0	\$0	-78.2%	-78.4% ... -77.1%	-159% ... +2%	100%	counted; single position drives the result (range jump)
2017→2018	\$3,239,504	\$3,239,504	\$107,602	\$0	\$0	+3.3%	+2.8% ... +5.8%	-129% ... +136%	98%	counted
2018→2019	\$239,503	\$239,503	\$107,602	\$0	\$0	+44.9%	+41.7% ... +54.6%	-73% ... +163%	7%	excluded; not eligible: traced coverage 7% < 60%
2019→2020	\$3,347,004	\$3,347,004	\$107,602	\$0	\$0	+3.2%	+2.7% ... +5.5%	-127% ... +134%	100%	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	10002382	House annual	5/15/2014	7	0	10002382.pdf d9a15f8ceb3ceba2d2263944223a60cf5fd12c6375b25bef00470b316faece75
2014	10006276	House annual	5/15/2015	11	0	10006276.pdf bf8e24ad501f9f82b14fd61ecc0e0b6dc6b44c0001e5f72848f6e84218485766
2015	10011563	House annual	5/16/2016	12	0	10011563.pdf 089d2fb0a1e1bab7c0c303107cc33b9dbb9b14278ede2ef8213e885c68708ea

2016	10017212	House annual	6/14/2017	13	0	10017212.pdf 662f22a437bace675088d23d1f84 09843f12610ed9e4dcdea609b326 966951ef
2017	10022113	House annual	5/15/2018	13	0	10022113.pdf 630987715f3db7f41ce3c4c52855 13785252e3ae582fbffa053a9350 2c6d7f9f
2018	10027598	House annual	5/15/2019	9	0	10027598.pdf c8476e88a49790f6ed4c6f40832 bb9bde4cc5d75d95422953dcd7e1 79aa429c5
2019	10038524	House annual	8/13/2020	9	0	10038524.pdf 182a89ee82a770d82d2eccd3c9a3 7793e47f2d1121ee231bf39d9eb7 3f3fc0ca
2020	10042365	House annual	8/11/2021	9	0	10042365.pdf 223b4193e7c6e2216e8f1f8a9dd9 0eda7ac353b3055bdce92299ffd a182e1bd4

Largest movers 2016→2017

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Piedmont Shopping Center, LLC ⇒ Piedmont Shopping Center [RP] percent ownership held joint	—	held	\$5,000,001 - \$25,000,000	\$1,000,001 - \$5,000,000	\$0	\$0
IRA, Jeffrey L. Fortenberry, Pershing LLC as Custodian ⇒ IVY High Income Fund Class A [MF]	—	held	\$15,001 - \$50,000	None	\$0	\$0
IRA, Jeffrey L. Fortenberry, Pershing LLC as Custodian ⇒ Pioneer Global High Yield Fund [M]	—	held	\$15,001 - \$50,000	None	\$0	\$0
IRA, Jeffrey L. Fortenberry, Pershing LLC as Custodian ⇒ John Hancock Core High Yield Fund	—	held	\$15,001 - \$50,000	None	\$0	\$0
IRA, Jeffrey L. Fortenberry, Pershing LLC as Custodian ⇒ Pershing Government Account Money	—	held	\$1,001 - \$15,000	None	\$0	\$0

TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement, CREF Stock Fund [MF]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
C. Gregory Write, Inc., 100% Interest [OL]	—	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Pepex Biomedical, Inc. [PS]	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0

Largest movers 2017→2018

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement, CREF Stock Fund [MF]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
C. Gregory Write, Inc., 100% Interest [OL]	—	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Pepex Biomedical, Inc. [PS]	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Piedmont Shopping Center, LLC ⇒ Piedmont Shopping Center [RP] percent ownership held joint	—	held	\$1,000,001 - \$5,000,000	\$1,000,001 - \$5,000,000	\$0	\$0
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement CREF Global Equities [MF]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Union Bank Checking Account [BA]	JT	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Gloria Deo, Inc., 50% Interest [OL]	—	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$0

Largest movers 2019→2020

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement CREF Global Equities [MF]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Mainstar Trust FBO Jeffrey Fortenberry IRA ⇒ Practice Management of America, Inc [PS] purc	—	held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$0	\$0

Union Bank Checking Account [BA]	JT	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Gloria Deo, Inc., 50% Interest [OL]	—	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$0
Practice Management of America, Inc. [PS] headquartered in Commack, New York.	—	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement, CREF Stock Fund [MF]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
C. Gregory Write, Inc., 100% Interest [OL]	—	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Pepex Biomedical, Inc. [PS]	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$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.