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GPO Member Guide)

# Rep. Jonathan L. Jackson (D-IL)

House · Democrat (most recent term) · IL-1 · in Congress 2023–present ·  
Bioguide ID J000309

**Party history:** D 2023–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 2022)         | 2022          | \$1,280,031      | <b>\$2,648,014</b> | \$4,015,998      |
| (b) Latest net worth estimate                                             | 2025          | \$1,329,060      | <b>\$2,945,029</b> | \$4,560,998      |
| (c) Estimated gain / loss, nominal dollars, 2022 → 2025 (3 years spanned) | 2022–<br>2025 | –<br>\$2,686,938 | <b>+\$297,014</b>  | +<br>\$3,280,967 |

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

**Reliability flags (net worth):** 2022: 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket; 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                                                                                                                     |
|-------------|--------------|-------------------|--------------------|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| 2022        | \$3,110,516  | \$462,501         | <b>\$2,648,014</b> | \$1,280,031 ... \$4,015,998 | computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket |
| 2023        | \$2,448,520  | \$407,501         | <b>\$2,041,018</b> | \$842,039 ... \$3,239,998   | computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket |
| 2024        | \$2,900,021  | \$450,001         | <b>\$2,450,020</b> | \$1,100,042 ... \$3,799,998 | computed                                                                                                                           |

|      |             |           |                    |                 |                                    |
|------|-------------|-----------|--------------------|-----------------|------------------------------------|
| 2025 | \$3,395,030 | \$450,001 | <b>\$2,945,029</b> | \$1,329,060 ... | computed; 1 Schedule A row(s)      |
|      |             |           |                    | \$4,560,998     | 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.)  
**-3.8%**

SIMPLE AVERAGE OF  
YEARS  
**-1.1%**

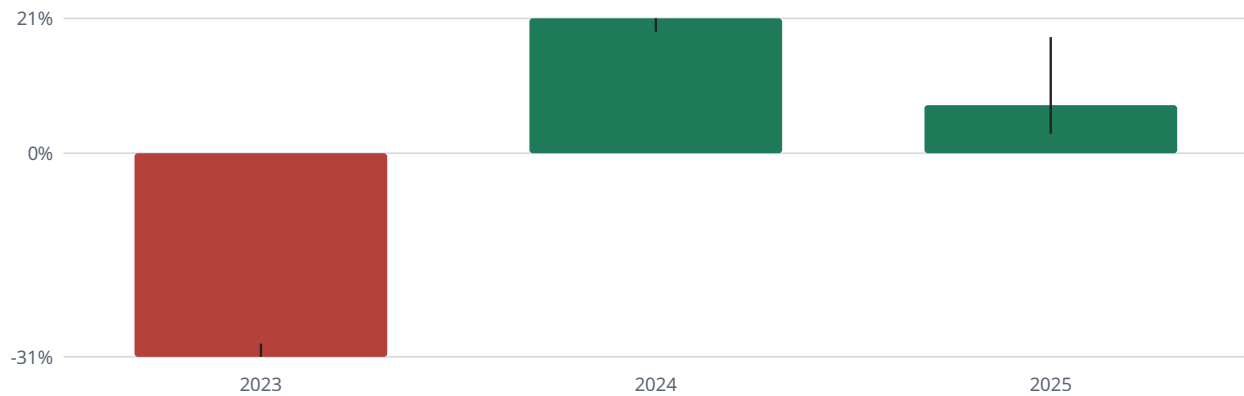
YEARS ESTIMATED  
**3**

BEST / WORST  
SINGLE YEAR  
**2024 +21%**  
**2023 -31%**

**Reliability flags:** few years (3); 2/3 years trading-dominated; 3 unparsed value(s).

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): -1.7% to -4.7%. 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                   |
|----------------|---------------------|---------------------|--------------|-------------|-------------|-----------|--------------------|-----------------|-----------------|--------------------------------|
| 2022→2023      | \$2,654,012         | \$1,598,510         | \$118,258    | \$170,503   | \$276,005   | -31.3%    | -36.0% ... -29.3%  | -107% ... +45%  | 97%             | count                          |
| 2023→2024      | \$2,276,018         | \$2,809,020         | \$194,959    | \$750,512   | \$495,508   | +20.8%    | +18.7% ... +25.9%  | -105% ... +147% | 96%             | count many new/exited position |
| 2024→2025      | \$2,777,018         | \$3,131,524         | \$174,759    | \$1,005,536 | \$682,008   | +7.4%     | +3.0% ... +17.9%   | -119% ... +133% | 96%             | count many new/exited position |

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

|      |          |                 |           |    |   |                                                                                                  |
|------|----------|-----------------|-----------|----|---|--------------------------------------------------------------------------------------------------|
| 2022 | 10062517 | House amendment | 8/2/2024  | 52 | 1 | <a href="#">10062517.pdf</a><br>df1aafe9531ed13b563445e61574dd163ef426fab0183fa4274794074ed6bb89 |
| 2023 | 10059883 | House annual    | 8/2/2024  | 54 | 1 | <a href="#">10059883.pdf</a><br>679154ed10234ad058c01fa98011f1461597361e2b851fc8d804085f3314f2ff |
| 2024 | 10067052 | House annual    | 5/15/2025 | 62 | 0 | <a href="#">10067052.pdf</a><br>c1774a85ba9d843a22187f42cbd48e88081e4ab04f2eca457815b71dc4f507da |
| 2025 | 10073351 | House annual    | 4/27/2026 | 78 | 1 | <a href="#">10073351.pdf</a><br>808e2e68df47dc43ac57969d31db6d142fe06dd601d2cd20cdbf45bcae1e053d |

## Largest movers 2022→2023

| Position (as written in filing)                                                   | Owner | Kind | Opening range(s)        | Closing range(s)      | Buys (mid) | Sales (mid) |
|-----------------------------------------------------------------------------------|-------|------|-------------------------|-----------------------|------------|-------------|
| S. Cornell Property [RP]                                                          | JT    | held | \$500,001 - \$1,000,000 | \$100,001 - \$250,000 | \$0        | \$0         |
| Morgan Stanley Trust Account ⇒ MORGAN STANLEY BANK N.A. # [BA]                    | JT    | held | \$250,001 - \$500,000   | \$100,001 - \$250,000 | \$0        | \$0         |
| Morgan Stanley Trust Account ⇒ NextEra Energy, Inc. (NEE) [ST]                    | JT    | held | \$100,001 - \$250,000   | None                  | \$0        | \$73,002    |
| 3 I Roadwork, Inc. [OL]                                                           | —     | held | \$50,001 - \$100,000    | None                  | \$0        | \$8,000     |
| Morgan Stanley Trust Account ⇒ Hartford Financial Services Group, Inc. (HIG) [ST] | JT    | held | \$15,001 - \$50,000     | \$50,001 - \$100,000  | \$0        | \$0         |
| Chase Bank [BA]                                                                   | JT    | held | \$15,001 - \$50,000     | \$50,001 - \$100,000  | \$0        | \$0         |
| Morgan Stanley Trust Account ⇒ The Hershey Company (HSY) [ST]                     | JT    | held | \$50,001 - \$100,000    | None                  | \$0        | \$32,500    |
| Morgan Stanley Trust Account ⇒ Agree Realty Corporation (ADC) [ST]                | JT    | held | \$15,001 - \$50,000     | None                  | \$0        | \$0         |

## Largest movers 2023→2024

| Position (as written in filing)                                                     | Owner | Kind | Opening range(s)      | Closing range(s)      | Buys (mid) | Sales (mid) |
|-------------------------------------------------------------------------------------|-------|------|-----------------------|-----------------------|------------|-------------|
| R.E. Partnerships 1802 E. 71st St. LLC<br>Roseland Building Venture [RP]            | JT    | held | \$100,001 - \$250,000 | \$250,001 - \$500,000 | \$0        | \$0         |
| Morgan Stanley Trust Account ⇒<br>MORGAN STANLEY BANK N.A. # [BA]                   | JT    | held | \$100,001 - \$250,000 | \$1,001 - \$15,000    | \$0        | \$0         |
| Morgan Stanley Trust Account ⇒ NVIDIA Corporation (NVDA) [ST]                       | JT    | held | \$15,001 - \$50,000   | \$100,001 - \$250,000 | \$0        | \$0         |
| Chase Bank [BA]                                                                     | JT    | held | \$50,001 - \$100,000  | \$100,001 - \$250,000 | \$0        | \$0         |
| Morgan Stanley Trust Account ⇒<br>Amazon.com, Inc. - Common Stock (AMZN) [ST]       | JT    | new  | —                     | \$50,001 - \$100,000  | \$32,500   | \$0         |
| Morgan Stanley Trust Account ⇒<br>McKesson Corporation (MCK) [ST]                   | JT    | held | \$15,001 - \$50,000   | \$50,001 - \$100,000  | \$0        | \$0         |
| Morgan Stanley Trust Account ⇒ Applied Materials, Inc. - Common Stock (AMAT) [ST]   | JT    | new  | —                     | None                  | \$75,000   | \$32,500    |
| Morgan Stanley Trust Account ⇒<br>Alphabet Inc. - Class A Common Stock (GOOGL) [ST] | JT    | held | \$15,001 - \$50,000   | \$50,001 - \$100,000  | \$0        | \$0         |

## Largest movers 2024→2025

| Position (as written in filing)                                                             | Owner | Kind | Opening range(s)     | Closing range(s)      | Buys (mid) | Sales (mid) |
|---------------------------------------------------------------------------------------------|-------|------|----------------------|-----------------------|------------|-------------|
| American Alliance of Museums 403(B) DC Plan ⇒ Vanguard Target Retirement 2030 Fund (VTHR)   | SP    | held | \$15,001 - \$50,000  | \$50,001 - \$100,000  | \$176,011  | \$0         |
| Morgan Stanley Trust Account ⇒ Cardinal Health, Inc. Common Stock (CAH) [ST]                | JT    | held | \$50,001 - \$100,000 | \$100,001 - \$250,000 | \$0        | \$0         |
| Morgan Stanley Trust Account ⇒ Shopify Inc. - Class A Subordinate Voting Shares (SHOP) [ST] | JT    | new  | —                    | \$100,001 - \$250,000 | \$107,501  | \$0         |
| Morgan Stanley Trust Account ⇒ T-Mobile US, Inc. (TMUS) [ST]                                | JT    | held | \$15,001 - \$50,000  | \$50,001 - \$100,000  | \$0        | \$0         |

|                                                                                  |    |      |                      |                      |     |          |
|----------------------------------------------------------------------------------|----|------|----------------------|----------------------|-----|----------|
| Morgan Stanley Trust Account ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST] | JT | held | \$50,001 - \$100,000 | None                 | \$0 | \$32,500 |
| Morgan Stanley Trust Account ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]       | JT | held | \$50,001 - \$100,000 | None                 | \$0 | \$32,500 |
| Morgan Stanley Trust Account ⇒ Linde plc - Ordinary Shares (LIN) [ST]            | JT | held | \$15,001 - \$50,000  | None                 | \$0 | \$75,000 |
| Morgan Stanley Trust Account ⇒ AMETEK, Inc. (AME) [ST]                           | JT | held | \$15,001 - \$50,000  | \$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.