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GPO Member Guide)

Sen. Mike Lee (R-UT)

Senate · Republican (most recent term) · UT · in Congress 2011–present ·
Bioguide ID L000577

Party history: R 2011–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 2011	2013	\$102,005	\$186,002	\$269,999
(b) Latest net worth estimate	2025	-\$769,996	– \$334,998	\$99,999
(c) Estimated gain / loss, nominal dollars, 2013 → 2025 (12 years spanned)	2013– 2025	– \$1,039,995	– \$521,000	–\$2,006

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	\$198,502	\$12,500	\$186,002	\$102,005 ... \$269,999	computed
2014	\$223,002	\$12,500	\$210,502	\$116,005 ... \$304,999	computed
2015	\$231,003	\$12,500	\$218,502	\$117,006 ... \$319,999	computed
2016	\$115,003	\$12,500	\$102,502	\$40,006 ... \$164,999	computed
2017	\$207,002	\$12,500	\$194,502	\$89,005 ... \$299,999	computed
2018	\$207,002	\$0	\$207,002	\$104,005 ... \$310,000	computed
2019	\$207,002	\$0	\$207,002	\$104,005 ... \$310,000	computed
2020	\$306,503	\$0	\$306,503	\$168,006 ... \$445,000	computed

2021	\$323,002	\$0	\$323,002	\$181,005 ... \$465,000	computed
2022	\$315,002	\$0	\$315,002	\$180,004 ... \$450,000	computed
2023	\$390,502	\$0	\$390,502	\$216,004 ... \$565,000	computed
2024	\$390,502	\$750,000	-\$359,498	-\$783,996 ... \$64,999	computed
2025	\$415,002	\$750,000	-\$334,998	-\$769,996 ... \$99,999	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.)
+3.8%

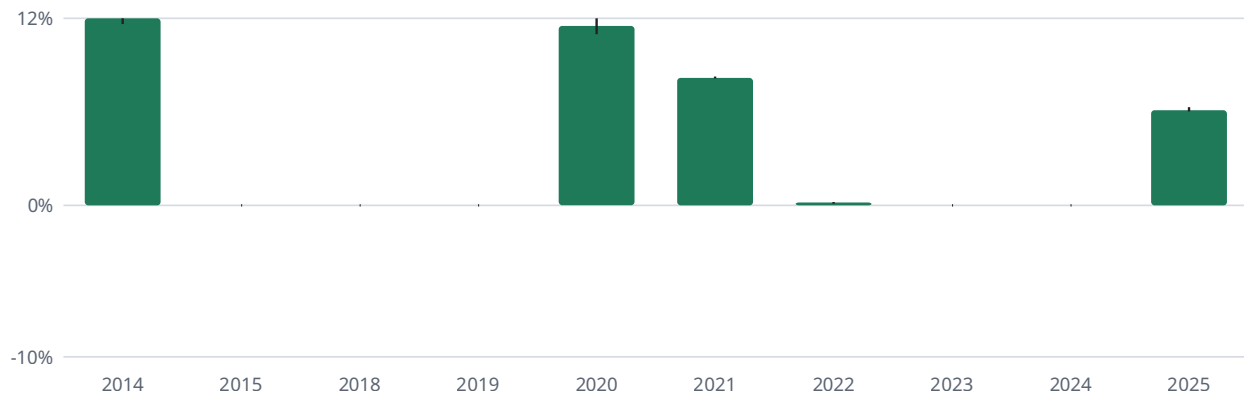
SIMPLE AVERAGE OF
YEARS
+3.9%

YEARS ESTIMATED
10

BEST / WORST
SINGLE YEAR
2014 +12%
2015 +0%

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +3.9% to +3.7%. 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
2013→2014	\$198,502	\$223,002	\$0	\$0	\$0	+12.3%	+12.0% ... +12.5%	-75% ... +100%	100%	counted
2014→2015	\$223,002	\$223,002	\$0	\$0	\$0	+0.0%	+0.0% ... +0.0%	-83% ... +83%	100%	counted
2015→2016	\$81,002	\$32,002	\$0	\$0	\$0	-60.5%	-87.5% ... -53.8%	-156% ... +35%	35%	excluded; not eligible: traced coverage 35% < 60%
2016→2017	\$24,002	\$24,002	\$0	\$0	\$0	+0.0%	+0.0% ... +0.0%	-175% ... +175%	21%	excluded; not eligible: traced prior-year value below \$50,000
2017→2018	\$207,002	\$207,002	\$0	\$0	\$0	+0.0%	+0.0% ... +0.0%	-100% ... +100%	100%	counted

2018→2019	\$207,002	\$207,002	\$0	\$0	\$0	+0.0%	+0.0% ... +0.0%	-100% ... +100%	100%	counted
2019→2020	\$207,002	\$231,502	\$0	\$0	\$0	+11.8%	+11.3% ... +13.5%	-93% ... +116%	100%	counted
2020→2021	\$298,502	\$323,002	\$600	\$0	\$0	+8.4%	+8.4% ... +8.5%	-83% ... +100%	97%	counted
2021→2022	\$315,002	\$315,002	\$600	\$0	\$0	+0.2%	+0.1% ... +0.2%	-86% ... +86%	98%	counted
2022→2023	\$207,501	\$207,501	\$0	\$0	\$0	+0.0%	+0.0% ... +0.0%	-89% ... +89%	66%	counted
2023→2024	\$390,502	\$390,502	\$0	\$0	\$0	+0.0%	+0.0% ... +0.0%	-89% ... +89%	100%	counted
2024→2025	\$390,502	\$415,002	\$0	\$0	\$0	+6.3%	+6.2% ... +6.5%	-86% ... +98%	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
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2013	8854f3f7-4f60-4282-a1ad-60656efb6084	Senate annual	05/15/2014	5	0	Senate eFD report 94f9f7 c9fd1b2 42af601 6c05a7 fe57d52 3469e12 9b261c3 b895f1 a097c97 717e
2014	db714d84-5e64-4496-8701-8b9bfd69fa7c	Senate annual	05/15/2015	5	0	Senate eFD report 57ed3c3 12bb268 d1d7420 65f49c6 0601d43 729f66 e5fa6e dd5493 cdaa97 ac83b
2015	36310996-89d6-44f3- b2eb-330e4c354907	Senate annual	05/16/2016	6	0	Senate eFD report 9baf43 d692668 e7ff58 a929d08 fe28e8 c6ee24 aeecd24 a490b6 c64df93 861dd4

2016	37bebf9d-e4a9-448d-b345-b5d894386f5d	Senate amendment	01/03/2019	6	0	Senate eFD report 6017c9 d01ebb3 aa7625 e615683 f864a8 ac5024 ec66b1 ce7375 b8b2fd b616a51 4
2017	67d9ce9b-6720-4d13-bb2c-cab5b38c23ef	Senate amendment	09/19/2018	5	0	Senate eFD report 7720f50 7ed3d95 367cd28 a85cd65 f0cc6e7 dd46c0 cab9123 1f4cde8 de924b4 9d
2018	5cd2e4cc-7a09-43d7-ab2f-f4c3c7a85a50	Senate amendment	10/04/2019	5	0	Senate eFD report 227da1 c8ff8a2 30af41 c45d15 edfbe31 d6c5422 e0addc d2cf20 edc5c14 1fa95f

2019	89c8c66b-ca15-4c08-a2ab-49c171365283	Senate annual	08/13/2020	5	0	Senate eFD report cf81c7 d6de45 ecdc1b fe652a0 ce16fd1 5c47a4 ad6fb58 74942d f9dec96 81cb2b
2020	af2f05af-b704-4ef7-ad44-051b3109a2de	Senate annual	08/16/2021	6	0	Senate eFD report b02fae1 28ba138 bafd001 0cb755 e9d0a81 0aa7c9 cf25ff6 22ff5d8 1228854 ff2
2021	8e5a7627-f8c8-435d-8e26-2e160fb48df0	Senate annual	05/16/2022	5	0	Senate eFD report 8ca475 c13d924 80b6da5 a33c7d d6f98a0 24d1239 257cc36 d390928 9092c9 d3d0

2022	6639ea68-a83f-4e8f-877c-ee576ce71324	Senate annual	05/12/2023	4	0	Senate eFD report d511864 9261301 99cbd87 0c331c4 ce72db aa0281 e8e7be f1425c4 ef1ccc2 a90b
2023	bb92d489- a444-452f-8fc3-783f92d061cd	Senate annual	08/13/2024	4	0	Senate eFD report 10bab01 6f6100 bbbc00 d8ed1a3 f5df73 fe36860 48ee55 d6f1658 41aedb d9362b
2024	0c2c5afa-cd3c-4b09-bd67- f2bd5410ce25	Senate annual	08/12/2025	4	0	Senate eFD report edd23e fd11c13 17dcef bc77f13 3f4719 e181ec e5d84d f9ea2b b31a544 5d0f0d3

2025	7074d4bc-00c3-4eda-b81c-0ad33acf62fa	Senate annual	08/13/2026	4	0	Senate eFD report 10f3abc7b641a17bf78599b5069b9d9fdd4c98a313a8b1655c84229a8c66ec01
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Largest movers 2022→2023

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Rollover IRA Fidelity Management ⇒ FFTHX	JT	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$0
Utah Retirement System ⇒ Long Horizon Fund	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0

Largest movers 2023→2024

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Rollover IRA Fidelity Management ⇒ FFTHX	JT	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$0
Utah Retirement System ⇒ Long Horizon Fund	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Utah Community Credit Union (Provo, UT) Type: Checking	SP	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$0
Utah Community Credit Union (Orem, UT) Type: Checking, Money Market Account, Savings	JT	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0

Largest movers 2024→2025

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
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Utah Community Credit Union (Orem, UT) Type: Checking, Money Market Account, Savings	JT	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
Rollover IRA Fidelity Management ⇒ FFTHX	JT	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$0
Utah Retirement System ⇒ Long Horizon Fund	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Utah Community Credit Union (Provo, UT) Type: Checking	SP	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 ±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.