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GPO Member Guide)

Rep. Ed Perlmutter (D-CO)

House · Democrat (most recent term) · CO-7 · in Congress 2007–2023 ·
Bioguide ID P000593

Party history: D 2007–2023. 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	– \$597,979	– \$67,490	\$462,998
(b) Latest net worth estimate	2021	– \$158,958	\$430,020	\$1,018,999
(c) Estimated gain / loss, nominal dollars, 2013 → 2021 (8 years spanned)	2013– 2021	– \$621,956	+ \$497,511	+ \$1,616,978

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	\$682,510	\$750,001	– \$67,490	– \$597,979 ... \$462,998	computed
2014	\$623,509	\$375,000	\$248,508	– \$134,982 ... \$631,999	computed
2015	\$382,007	\$375,000	\$7,006	– \$300,986 ... \$314,999	computed
2016	\$382,016	\$375,000	\$7,016	– \$378,967 ... \$392,999	computed
2017	\$381,516	\$375,000	\$6,516	– \$378,968 ... \$391,999	computed
2018	\$437,522	\$375,000	\$62,521	– \$382,957 ... \$507,999	computed
2019	\$843,524	\$375,000	\$468,524	– \$164,952 ... \$1,101,999	computed

2020	\$829,523	\$375,000	\$454,522	-\$155,954 ... computed \$1,064,999
2021	\$805,021	\$375,000	\$430,020	-\$158,958 ... computed \$1,018,999

- **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.)

-12.0%

SIMPLE AVERAGE OF
YEARS

-9.0%

YEARS ESTIMATED

8

BEST / WORST
SINGLE YEAR

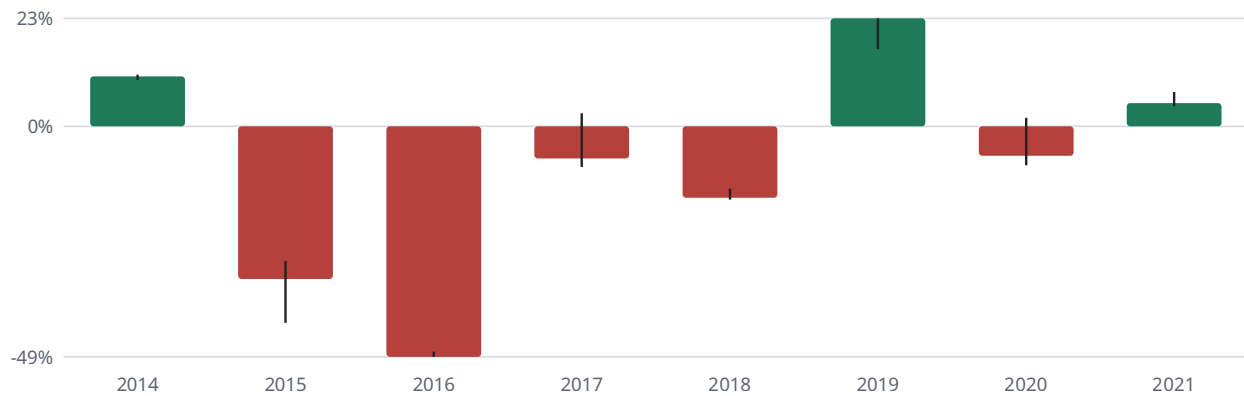
2019 +23%

2016 -49%

Reliability flags: 3/8 years trading-dominated.

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): -8.6% to -12.3%. 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	\$558,508	\$575,008	\$10,902	\$0	\$32,500	+10.7%	+9.9% ... +11.1%	-74% ... +96%	82%	counted
2014→2015	\$623,008	\$382,007	\$21,104	\$0	\$16,001	-32.7%	-42.1% ... -28.8%	-108% ... +42%	100%	counted
2015→2016	\$382,007	\$294,011	\$19,710	\$120,506	\$0	-49.4%	-52.7% ... -48.3%	-173% ... +74%	100%	counted; many new/exited positions
2016→2017	\$332,514	\$300,512	\$17,062	\$8,000	\$0	-6.9%	-8.7% ... +2.8%	-141% ... +127%	87%	counted
2017→2018	\$365,515	\$333,515	\$7,964	\$56,004	\$24,002	-15.3%	-15.7% ... -13.3%	-166% ... +135%	96%	counted
2018→2019	\$437,021	\$771,021	\$9,270	\$398,004	\$156,002	+23.2%	+16.6% ... +65.9%	-217% ... +263%	100%	counted; high turnover (buys+sells > 100% of opening value)

2019→2020	\$835,524	\$757,018	\$9,773	\$168,010	\$184,012	-6.3%	-8.3% ... +1.8%	-154% ... +142%	99%	counted; many new/ exited positions
2020→2021	\$707,518	\$708,514	\$18,762	\$112,506	\$128,008	+5.0%	+4.3% ... +7.4%	-135% ... +145%	85%	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	10001476	House annual	8/4/2014	24	0	10001476.pdf bbbc678cfe4d23bfba2dc2d2a6849f0852f5638a200c9b8f270788b54bcd714e
2014	10005716	House annual	8/10/2015	18	0	10005716.pdf a2c61405821e026a2a16fa3a8dacf5a70a84924ac3a04d8de9775d4336a55fdb
2015	10014101	House amendment	10/3/2016	18	0	10014101.pdf f0fa2044cb7f6d6ddcac720cce85fdc78d48fa117e282e4f880102122a988eb7
2016	10016283	House annual	8/11/2017	37	0	10016283.pdf 5090ac36f96ad4a847a148cb2c7b387db696d69d620aa9241935c6d12ba2ea5
2017	10022009	House annual	8/13/2018	38	0	10022009.pdf 03f0088a5fda712efe8b229bc699bd46b9226c0ce40171b9ea2efbbe862c5405
2018	10026591	House annual	8/13/2019	48	0	10026591.pdf b7150ce7fa8df97a7fd5dad2bef23cf31cd8393285fdfe3e21e701da690bfd82

2019	10037784	House annual	8/12/2020	56	0	10037784.pdf a70c996c937ed795cf05d1514 bdc998e209f11d8a2513ca4b2 a8d8b123cdf92c
2020	10042213	House annual	8/6/2021	76	0	10042213.pdf a1bda31fc05df3c49eb651d02 649c17bc79f522324ea3df431 a7c46f526a1221
2021	10048064	House annual	8/9/2022	47	0	10048064.pdf 6041727c6b0bb6600dc340f74 c1bd9b8f28cb56ccadc14a25 c21197d806c49c7

Largest movers 2018→2019

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Stanley Black & Decker, Inc. (SWK) [ST]	—	new	—	\$100,001 - \$250,000	\$175,000	\$75,000
U.S. Bancorp (USB) [ST]	—	new	—	\$100,001 - \$250,000	\$175,000	\$65,001
Walgreens Boots alliance, Inc. (WBa) [ST]	SP	held	\$1,001 - \$15,000	None	\$0	\$0
SPDR Series Trust SPDR Portfolio S&P 500 Value ETF (SPYV) [ST]	SP	new	—	\$1,001 - \$15,000	\$8,000	\$8,000
Individual Retirement account ⇒ SPDR Series Trust S&P 500 [EF]	SP	held	\$1,001 - \$15,000	None	\$0	\$0
Vanguard Financials ETF [EF]	SP	held	\$1,001 - \$15,000	None	\$0	\$0
SPDR Series Trust S&P [EF]	SP	held	\$1,001 - \$15,000	None	\$0	\$0
alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	held	\$1,001 - \$15,000	None	\$0	\$0

Largest movers 2019→2020

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Wells Fargo Money Market Savings [Ba]	SP	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0

Invesco QQQ Trust, Series 1 (QQQ) [ST]	SP	held	\$1,001 - \$15,000	None; \$1,001 - \$15,000	\$24,002	\$40,002
Vanguard REIT [MF]	SP	held	\$1,001 - \$15,000	None	\$0	\$0
Deep Value ETF [EF]	SP	held	\$1,001 - \$15,000	None	\$0	\$0
Invesco ETF SR LN [EF]	SP	held	\$1,001 - \$15,000	None	\$0	\$0
Invesco S&P Pure Value [EF]	SP	held	\$1,001 - \$15,000	None	\$0	\$0
Individual Retirement account ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	held	\$1,001 - \$15,000	None	\$0	\$0
alphabet Inc. - Class a (GOOGL) [ST]	SP	held	\$1,001 - \$15,000	None	\$0	\$0

Largest movers 2020→2021

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
SPDR DoubleLine Total Return Tactical ETF (TOTL) [EF]	SP	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$8,000	\$0
SPDR S&P Dividend ETF (SDY) [EF]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$8,000	\$0
Invesco KBW Bank ETF (KBWB) [ST]	SP	held	\$1,001 - \$15,000	None	\$8,000	\$8,000
Vanguard Real Estate ETF (VNQ) [ST]	SP	new	—	\$1,001 - \$15,000	\$16,001	\$0
Costco Wholesale Corporation (COST) [ST]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$8,000
PIMCO Active Bond Exchange-Traded Fund Exchange- Traded Fund (BOND) [EF]	SP	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$32,500	\$16,001
Vanguard Mid-Cap ETF (VO) [EF]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$8,000	\$16,001
iShares S&P Global Clean Energy Index Fund (ICLN) [EF]	SP	held	\$1,001 - \$15,000	\$1 - \$1,000	\$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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