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Rep. Thomas J. Rooney (R-FL)

House · Republican (most recent term) · FL-17 · in Congress 2009–2019 ·
Bioguide ID R000583

Party history: R 2009–2019. 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 2009	2013	\$42,023,110	\$110,609,554	\$179,195,997
(b) Latest net worth estimate	2017	\$54,844,237	\$106,552,118	\$158,259,999
(c) Estimated gain / loss, nominal dollars, 2013 → 2017 (4 years spanned)	2013– 2017	– \$124,351,760	–\$4,057,436	+ \$116,236,889

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

Reliability flags (net worth): 2017: 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
2013	\$111,134,555	\$525,002	\$110,609,554	\$42,023,110 ... \$179,195,997	computed
2014	\$111,161,056	\$175,000	\$110,986,056	\$42,367,113 ... \$179,604,999	computed; 3 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2015	\$104,347,590	\$175,000	\$104,172,590	\$55,487,180 ... \$152,857,999	computed

2016	\$107,352,626	\$175,000	\$107,177,626	\$55,130,253 ... \$159,224,999	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2017	\$106,727,118	\$175,000	\$106,552,118	\$54,844,237 ... \$158,259,999	computed; 1 Schedule A row(s) 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.)
+6.3%

SIMPLE AVERAGE OF
YEARS
+7.0%

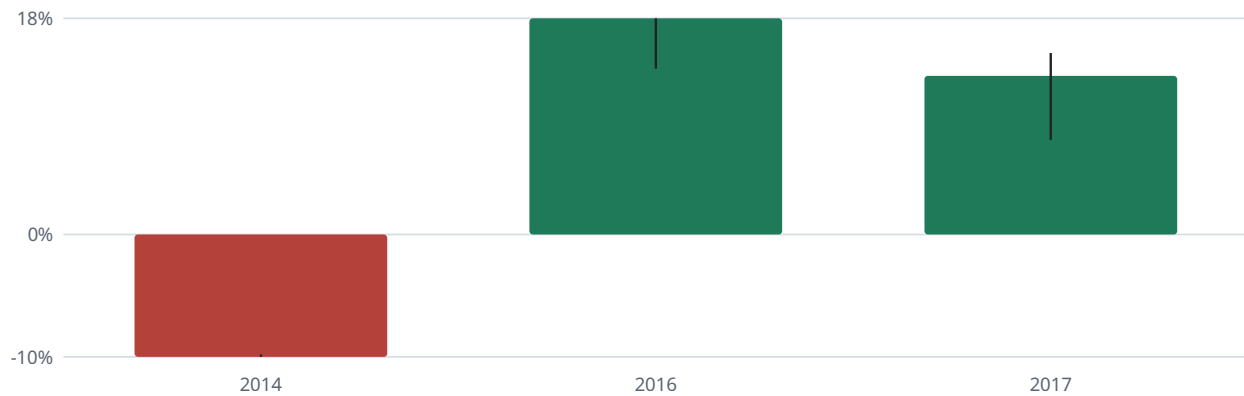
YEARS ESTIMATED
3

BEST / WORST
SINGLE YEAR
2016 +18%
2014 -10%

Reliability flags: few years (3); avg traced coverage 74%; 5 unparsed value(s).

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +3.0% to +7.4%. 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
2013→2014	\$72,929,539	\$68,579,037	\$37,004	\$4,764,007	\$1,621,505	-10.2%	-11.1% ... -10.0%	-134% ... +113%	66%
2014→2015	\$19,786,010	\$21,974,032	\$54,714	\$1,982,040	\$962,505	+6.2%	+4.8% ... +12.3%	-134% ... +146%	18%
2015→2016	\$73,747,050	\$84,730,560	\$4,299,190	\$2,833,021	\$871,504	+18.1%	+13.9% ... +19.6%	-88% ... +124%	71%
2016→2017	\$92,222,601	\$95,428,591	\$7,353,966	\$2,982,036	\$4,645,533	+13.3%	+7.9% ... +15.2%	-94% ... +120%	86%

Filings used

Each annual-report year uses one filing (most recently filed version among originals/amendments whose Schedule A row count is ≥ 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	10004978	House amendment	3/17/2015	124	0	10004978.pdf 9297f3d44268b9bc25d14820368fd418e749dea08942e9ee75f7397096d3d435
2014	10008658	House amendment	9/29/2015	138	3	10008658.pdf f0c250826436b5326884915fe6cf425622b6a25e85585ecf8583301a9c94e01b
2015	10010603	House annual	8/14/2016	259	0	10010603.pdf 08b899b2d9bcba9af7b245105edd38d1c43730d17103f3e2973999fba0793db
2016	10016641	House annual	8/8/2017	274	1	10016641.pdf 0aa5a72dff51a4efa64d1697551420c1fbd075c00ce7296d03e066bcf602f434
2017	10021225	House annual	8/8/2018	298	1	10021225.pdf 8c1c6da191ad6c5ee5ddefa57a155007770c3a1f00b80edc533a5f575b3407de

Largest movers 2013→2014

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Patrick Rooney Sr 2011 Delaware Trust ⇒ Eaton Vance Floating Rate - I	—	held	\$1,000,001 - \$5,000,000	None	\$0	\$0
Patrick Rooney Sr 2011 Delaware Trust ⇒ Doubleline Total Ret Bd - I	—	held	\$1,000,001 - \$5,000,000	None	\$0	\$0
Patrick Rooney Sr 2011 Delaware Trust ⇒ iShares MSCI EAFE Index Fund	—	new	—	\$1,000,001 - \$5,000,000	\$375,000	\$0
Patrick Rooney Sr 2011 Delaware Trust ⇒ Oakmark International Fd - I	—	held	\$1,000,001 - \$5,000,000	\$500,001 - \$1,000,000	\$0	\$0

Patrick Rooney Sr 2011 Delaware Trust ⇒ Mathews Pacific Tiger FD - I	—	held	\$1,000,001 - \$5,000,000	\$500,001 - \$1,000,000	\$0	\$0
Patrick Rooney Sr 2011 Delaware Trust ⇒ JPM Large Cap Growth Fd - Sel	—	held	\$1,000,001 - \$5,000,000	\$500,001 - \$1,000,000	\$0	\$0
Patrick Rooney Sr 2011 Delaware Trust ⇒ JPM Global Res Enh Index Fd - Sel	—	held	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$0	\$0
Patrick Rooney Sr 2011 Delaware Trust ⇒ Och - Ziff OZDPII Private Investors	—	held	\$15,001 - \$50,000	\$1,000,001 - \$5,000,000	\$750,000	\$0

Largest movers 2015→2016

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Patrick Rooney Sr 2015 Delaware Trust ⇒ JP Morgan US Large Cap Core Plus	—	new	—	\$1,000,001 - \$5,000,000	\$83,001	\$0
Patrick Rooney Sr 2015 Delaware Trust ⇒ Beartown Partners Fund, LP	—	held	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$0	\$0
Patrick Rooney Sr 2015 Delaware Trust ⇒ Lyrical US Value Equity Fund	—	new	—	\$500,001 - \$1,000,000	\$75,000	\$0
Patrick Rooney Sr 2015 Delaware Trust ⇒ SPDR S&P 500 Etf Tr Tr Unit	—	held	\$1,000,001 - \$5,000,000	\$1,000,001 - \$5,000,000	\$0	\$375,000
Patrick Rooney Sr 2015 Delaware Trust ⇒ Homestead Small-Company Stock	—	held	\$250,001 - \$500,000	\$500,001 - \$1,000,000	\$0	\$0
Patrick Rooney Sr 2015 Delaware Trust ⇒ Oppenheimer Senior Floating Rate Fund	—	new	—	\$500,001 - \$1,000,000	\$375,000	\$0
Patrick Rooney Sr 2015 Delaware Trust ⇒ Blackrock Capital Investment Corp	—	new	—	\$250,001 - \$500,000	\$107,501	\$0
Patrick Rooney Sr 2015 Delaware Trust ⇒ Ares Capital Corporation - Closed End Fund (ARCC)	—	new	—	\$250,001 - \$500,000	\$115,502	\$0

Largest movers 2016→2017

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Patrick Rooney Sr 2015 Delaware Trust ⇒ John Hancock Disciplined Value [MF]	—	held	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$75,000	\$0
Patrick Rooney Sr 2015 Delaware Trust ⇒ Lyrical US Value Equity Fund [MF]	—	held	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$175,000	\$0
Patrick Rooney Sr 2015 Delaware Trust ⇒ Putnam Tax Free High Yield Fund [GS]	—	held	\$500,001 - \$1,000,000	\$100,001 - \$250,000	\$75,000	\$0
Patrick Rooney Sr 2015 Delaware Trust ⇒ Oppenheimer International [MF]	—	held	\$100,001 - \$250,000	\$500,001 - \$1,000,000	\$0	\$0
Patrick Rooney Sr 2015 Delaware Trust ⇒ SPDR S&P 500 Etf Tr Tr Unit [MF]	—	held	\$1,000,001 - \$5,000,000	\$1,000,001 - \$5,000,000	\$0	\$375,000
Patrick Rooney Sr 2015 Delaware Trust ⇒ Homestead Small-Company Stock [MF]	—	held	\$500,001 - \$1,000,000	\$250,001 - \$500,000	\$0	\$0
Patrick Rooney Sr 2015 Delaware Trust ⇒ Fortress Transportation and Infrastructure Investo	—	held	\$250,001 - \$500,000	\$500,001 - \$1,000,000	\$250,001	\$250,001
Patrick Rooney Sr 2015 Delaware Trust ⇒ Oppenheimer Senior Floating Rate Fund [MF]	—	held	\$500,001 - \$1,000,000	None	\$0	\$375,000

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 $\geq$ \$50,000 and traced coverage $\geq$ 60% of the opening midpoint. A member is ranked only with $\geq$ 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 $\pm 100\%$.
- 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 $t-1 \rightarrow t$ 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.