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GPO Member Guide)

Rep. José E. Serrano (D-NY)

House · Democrat (most recent term) · NY-15 · in Congress 1990–2021 ·
Bioguide ID S000248

Party history: D 1990–2021. 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 1990	2013	\$50,001	\$75,000	\$100,000
(b) Latest net worth estimate	2019	\$50,001	\$75,000	\$100,000
(c) Estimated gain / loss, nominal dollars, 2013 → 2019 (6 years spanned)	2013– 2019	– \$49,999	+\$0	+ \$49,999

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	\$75,000	\$0	\$75,000	\$50,001 ... \$100,000	computed
2014	\$75,000	\$0	\$75,000	\$50,001 ... \$100,000	computed
2015	\$75,000	\$0	\$75,000	\$50,001 ... \$100,000	computed
2016	\$75,000	\$0	\$75,000	\$50,001 ... \$100,000	computed
2017	\$75,000	\$0	\$75,000	\$50,001 ... \$100,000	computed
2018	\$75,000	\$0	\$75,000	\$50,001 ... \$100,000	computed
2019	\$75,000	\$0	\$75,000	\$50,001 ... \$100,000	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.)

+0.1%

SIMPLE AVERAGE OF
YEARS

+0.1%

YEARS ESTIMATED

6

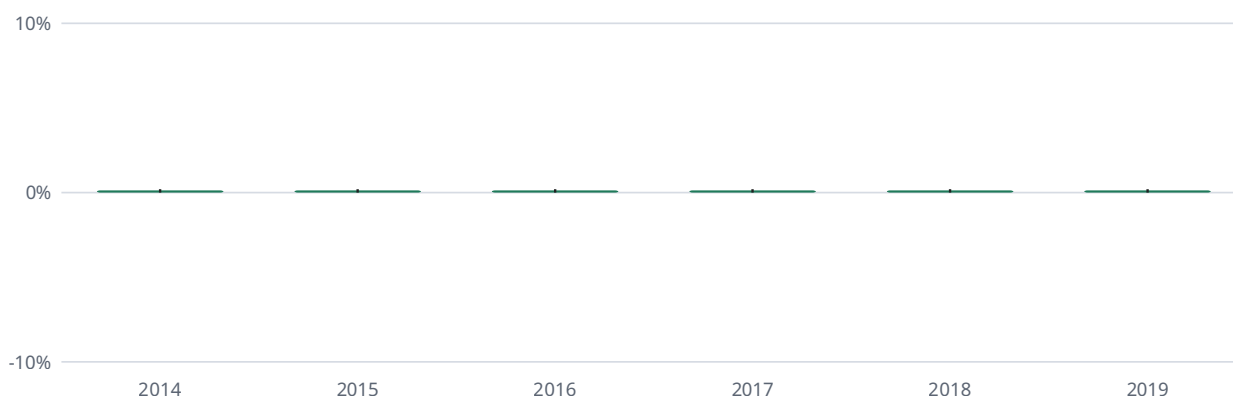
BEST / WORST
SINGLE YEAR

2014 +0%

2014 +0%

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +0.0% to +0.2%. 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	\$75,000	\$75,000	\$100	\$0	\$0	+0.1%	+0.0% ... +0.2%	-67% ... +67%	100%	counted
2014→2015	\$75,000	\$75,000	\$100	\$0	\$0	+0.1%	+0.0% ... +0.2%	-67% ... +67%	100%	counted
2015→2016	\$75,000	\$75,000	\$100	\$0	\$0	+0.1%	+0.0% ... +0.2%	-67% ... +67%	100%	counted
2016→2017	\$75,000	\$75,000	\$100	\$0	\$0	+0.1%	+0.0% ... +0.2%	-67% ... +67%	100%	counted
2017→2018	\$75,000	\$75,000	\$100	\$0	\$0	+0.1%	+0.0% ... +0.2%	-67% ... +67%	100%	counted
2018→2019	\$75,000	\$75,000	\$100	\$0	\$0	+0.1%	+0.0% ... +0.2%	-67% ... +67%	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	10001112	House annual	5/14/2014	1	0	10001112.pdf a61e03b506537cbaf61089ef0a3b682be765d65aff0b75a6bf453c0e8d52485d
2014	10006877	House annual	5/14/2015	1	0	10006877.pdf 1c474ef6d36a425351b117402b0106c05aaa780fda814c6aa71e45301e324f46

2015	10013212	House amendment	6/22/2016	1	0	10013212.pdf f8b4406e9c3796a3638c0f2c cf34aa7e32f8c01a0caf02140 ae57433a3ce0b73
2016	10015956	House annual	5/3/2017	1	0	10015956.pdf f8ee13d458935a9a0620c3f9 ab629be957e837f8aece2da7 a2a4a8d4589c2130
2017	10021374	House annual	5/2/2018	1	0	10021374.pdf 72a3621e2838f55848a4fd79 f4b241c5d1c9d2604705b9c27 47bf0543478887f
2018	10026224	House annual	5/10/2019	1	0	10026224.pdf c8a16b73460671a2924cef475 99f87ef4b48976639c7e89941 eab1914d2e60d9
2019	10036581	House annual	6/25/2020	1	0	10036581.pdf 41499b73dc26ce66ad514d1e2 aadd66e733020761882f009d4 41a59c117729ee

Largest movers 2016→2017

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Wright Patman Congressional Federal Credit Union [BA]	—	held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$0	\$0

Largest movers 2017→2018

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Wright Patman Congressional Federal Credit Union [BA]	—	held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$0	\$0

Largest movers 2018→2019

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
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Wright Patman Congressional Federal Credit Union [BA]	— held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$0	\$0
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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.