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GPO Member Guide)

Sen. Brian Schatz (D-HI)

Senate · Democrat (most recent term) · HI · in Congress 2012–present ·
Bioguide ID S001194

Party history: D 2012–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 2012	2013	– \$1,984,983	– \$1,257,494	–\$530,004
(b) Latest net worth estimate	2025	–\$137,980	\$3,183,508	\$6,504,995
(c) Estimated gain / loss, nominal dollars, 2013 → 2025 (12 years spanned)	2013– 2025	+\$392,024	+ \$4,441,001	+ \$8,489,978

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	\$307,508	\$1,565,002	–\$1,257,494	–\$1,984,983 ... – \$530,004	computed
2014	\$193,508	\$782,501	–\$588,994	–\$992,985 ... – \$185,002	computed
2015	\$193,508	\$782,501	–\$588,994	–\$992,985 ... – \$185,002	computed
2016	\$193,508	\$782,501	–\$588,994	–\$992,985 ... – \$185,002	computed
2017	\$601,008	\$1,200,002	–\$598,993	–\$1,277,983 ... \$79,997	computed
2018	\$643,508	\$1,200,002	–\$556,493	–\$1,242,983 ... \$129,997	computed

2019	\$958,510	\$1,157,502	-\$198,991	-\$1,012,979 ... \$614,997	computed
2020	\$958,011	\$2,282,502	-\$1,324,492	-\$2,548,978 ... - \$100,005	computed
2021	\$1,282,012	\$1,125,001	\$157,010	-\$820,977 ... \$1,134,998	computed
2022	\$1,223,012	\$1,125,001	\$98,011	-\$818,976 ... \$1,014,998	computed
2023	\$4,522,513	\$1,125,001	\$3,397,512	\$345,026 ... \$6,449,998	computed
2024	\$4,808,510	\$1,875,002	\$2,933,508	-\$387,979 ... \$6,254,996	computed
2025	\$4,933,510	\$1,750,002	\$3,183,508	-\$137,980 ... \$6,504,995	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.)
-4.1%

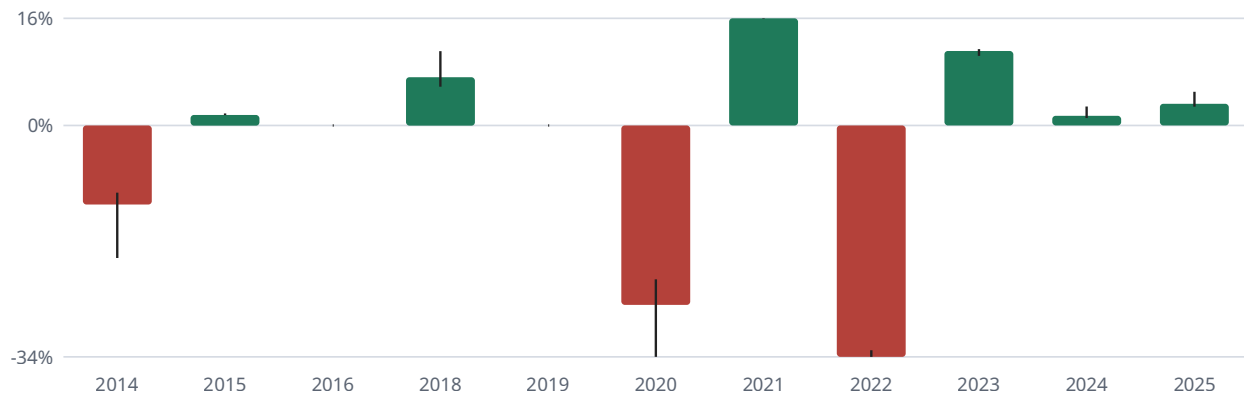
SIMPLE AVERAGE OF
YEARS
-2.9%

YEARS ESTIMATED
11

BEST / WORST
SINGLE YEAR
2021 +16%
2022 -34%

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): -5.9% to -3.5%. 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	\$186,006	\$161,506	\$3,002	\$0	\$0	-11.6%	-19.4% ... -9.8%	-135% ... +112%	60%	counted
2014→2015	\$193,508	\$193,508	\$3,002	\$0	\$0	+1.6%	+1.5% ... +1.8%	-141% ... +144%	100%	counted
2015→2016	\$193,508	\$193,508	\$0	\$0	\$0	+0.0%	+0.0% ... +0.0%	-141% ... +141%	100%	counted
2016→2017	\$80,005	\$104,505	\$0	\$0	\$0	+30.6%	+23.3% ... +139.9%	-157% ... +219%	41%	excluded; not eligible: traced coverage 41% < 60%
2017→2018	\$601,008	\$643,508	\$0	\$0	\$0	+7.1%	+5.7% ... +10.9%	-87% ... +101%	100%	counted
2018→2019	\$619,507	\$619,507	\$0	\$0	\$0	+0.0%	+0.0% ... +0.0%	-86% ... +86%	96%	counted
2019→2020	\$668,507	\$493,007	\$0	\$0	\$0	-26.3%	-35.6% ... -22.5%	-106% ... +54%	70%	counted

2020→2021	\$950,010	\$1,099,010	\$0	\$0	\$0	+15.7%	+15.6% ... +15.7%	-87% ... +118%	99%	counted
2021→2022	\$1,282,012	\$848,012	\$0	\$0	\$0	-33.9%	-36.5% ... -32.9%	-113% ... +46%	100%	counted
2022→2023	\$1,148,012	\$1,272,512	\$600	\$0	\$0	+10.9%	+10.2% ... +11.2%	-84% ... +106%	94%	counted
2023→2024	\$3,976,008	\$3,967,508	\$65,001	\$0	\$0	+1.4%	+1.1% ... +2.8%	-121% ... +124%	88%	counted
2024→2025	\$3,703,007	\$3,703,007	\$117,502	\$0	\$0	+3.2%	+2.8% ... +4.9%	-122% ... +128%	77%	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	edc851b8-928b-4b52-8459-ab749ff0b92b	Senate amendment	08/14/2015	17	0	Senate eFD report 9c766d5 b945f1 ba98f49 0fe9ce d46a2e1 483c4f b240314 f7bb91 de409d1 1bb9c

2014	f3b604ee-df18-475e-9954-d0e452d52247	Senate annual	08/13/2015	15	0	Senate eFD report 618a79 d9bd798 e0297f d4c50d2 c81c35 c6b5f17 77ac4f4 3d9a9e4 cd1c536 fa74
2015	2a9bcaf7-63d0-4c94-a432-d9802e62c6af	Senate annual	08/11/2016	15	0	Senate eFD report 4f72ab cb92ee5 93c1178 d3c2793 096c561 5d22263 7037e17 d05f8a0 d6d75c1 64
2016	5963ff5d-7570-470c-9037-e5cadb99731a	Senate annual	08/11/2017	15	0	Senate eFD report 2e74d87 608bc91 eae9085 29bf20 ef5b1f c4434b9 0854365 16267a5 d96ee5 c040

2017	490db61b-5705-421b-8b06-1832f4d84190	Senate annual	08/13/2018	17	0	Senate eFD report 82fb2a8 d750507 8e324b3 a1fd91 d19779 c49d416 2c3253 e21b4c d75a102 3e009
2018	54d9a0d4-f5e1-434b-97ff-53f764a7f0f4	Senate annual	07/22/2019	17	0	Senate eFD report f0c4f6 c627671 933d635 04505f7 42bf3a fd647c3 586105 e5e50a f593142 8cd10
2019	2ec99e0f-6383-49f1-bd27-58bb001437c4	Senate annual	08/11/2020	21	0	Senate eFD report 0647157 9641bd dc99c2 cbcf64 ef497b3 d33d8d0 6fc9fd0 b78c731 63aada3 8a60

2020	ab376804-bab1-4750-a69a- aced9fe6a7be	Senate amendment	01/20/2022	22	0	Senate eFD report a65b532 a29c706 eab1d4 b75a25 c7545a c0e14b2 61e8dc9 9e4b8e4 48811f3 9d63
2021	3d2cb46f-6a6c-4f70-85c9- c75c560b8154	Senate amendment	07/31/2024	23	0	Senate eFD report 0a7213 f896760 64e4912 d4b0ac1 af781f6 34d35d0 99f97a e57d1a e519530 1807
2022	00f71836-15dd-46c9- b884-254e5479891e	Senate amendment	07/31/2024	24	0	Senate eFD report 4c79002 c2e1d44 e2a88a d07e522 981c32 b0c4418 2e3382 c805f94 1c31d57 f62e

2023	c0bab3b6-4e45-4318-8f17-f06d7efbec4b	Senate annual	07/31/2024	26	0	Senate eFD report f5d6d4 fc7e59 f55cb38 8a39387 7d5c98 d2d2f7 c9e6e87 aee5db1 f7acdc9 890a1
2024	3940df10-b601-40ba-ad98-539ed8d1ea69	Senate annual	08/13/2025	21	0	Senate eFD report 2448791 eaa8e96 3adc f5 f5c6a1 ab8be89 bd6aab3 2495fa f24607 cb68be3 a7148
2025	4fde18b9-6e75-4517-87f2-a623802662d2	Senate annual	07/31/2026	20	0	Senate eFD report 9d8dad f40ae8 d25ef2 e44eb43 ca076e7 93a1dd4 c20d8c7 8da63a0 e81a2d0 080a

Largest movers 2022→2023

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Pier Wailuku, LLC Company: Pier Wailuku, LLC (Los Alamitos, CA) Description: Holding Compa	SP	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0

TIAA-CREF Research Corp of UH Retirement ⇒ TIQRX - TIAA-CREF Equity Index R (NASDAQ)	—	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
Helping Hands Hawaii 403(b) Thrift ⇒ Mutual of America - Fidelity Investments VIP Contrafu	—	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Helping Hands Hawaii 403(b) Thrift ⇒ MAVSX - Mutual of America Instl Small Cap Value	—	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
American Funds 529 Institution: American Funds ⇒ CICAX - American Funds Invmt Co of Amer 5	JT	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Brookfield 401(k) ⇒ Fidelity Contrafund Commingled Pool	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
TIAA-CREF Research Corp of UH Retirement ⇒ TRRSX - TIAA-CREF Real Estate Sec Retire (NASDA	—	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Helping Hands Hawaii 403(b) Thrift ⇒ MASSX - Mutual of America Instl Small Cap Growth	—	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)
Pier Wailuku, LLC Company: Pier Wailuku, LLC (Los Alamitos, CA) Description: Holding Compa	SP	held	\$100,001 - \$250,000	\$50,001 - \$100,000	\$0	\$0
Helping Hands Hawaii 403(b) Thrift ⇒ Mutual of America - Fidelity Investments VIP Contrafu	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
TIAA-CREF Research Corp of UH Retirement ⇒ QCSTPX - CREF Stock R2	—	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
TIAA-CREF Research Corp of UH Retirement ⇒ TRSCX - TIAA-CREF Social Choice Eq Retire (NASD	—	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
Helping Hands Hawaii 403(b) Thrift ⇒ MAVSX - Mutual of America Instl Small Cap Value	—	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0

American Funds 529 Institution: American Funds ⇒ CICAX - American Funds Invmt Co of Amer 5	JT	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
TIAA-CREF Research Corp of UH Retirement ⇒ TIQRX - TIAA-CREF Equity Index R (NASDAQ)	—	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
TIAA-CREF Research Corp of UH Retirement ⇒ TRRSX - TIAA-CREF Real Estate Sec Retire (NASDA	—	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)
Helping Hands Hawaii 403(b) Thrift ⇒ Mutual of America - Fidelity Investments VIP Contrafu	—	held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$0	\$0
Helping Hands Hawaii 403(b) Thrift ⇒ MAVSX - Mutual of America Instl Small Cap Value	—	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
TIAA-CREF Research Corp of UH Retirement ⇒ TRRSX - TIAA-CREF Real Estate Sec Retire (NASDA	—	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Helping Hands Hawaii 403(b) Thrift ⇒ MASSX -Mutual of America Instl Small Cap Growth	—	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Bank of Hawaii (Honolulu, HI) Type: Checking, Savings	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Pier Wailuku, LLC Company: Pier Wailuku, LLC (Los Alamitos, CA) Description: Holding Compa	SP	held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$0	\$0
Residential Property Description: Residential Real Estate (Washington, DC)	JT	held	\$250,001 - \$500,000	\$250,001 - \$500,000	\$0	\$0
Residential Property Description: Residential Real Estate (Honolulu, HI)	JT	held	\$1,000,001 - \$5,000,000	\$1,000,001 - \$5,000,000	\$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.