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GPO Member Guide)

Sen. Patrick J. Toomey (R-PA)

House / Senate · Republican (most recent term) · PA · in Congress 1999–2023
· Bioguide ID T000461

Party history by chamber: House R 1999–2005, Senate R 2011–2023. 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 1999	2013	\$1,383,049	\$2,889,024	\$4,394,999
(b) Latest net worth estimate	2021	– \$3,316,910	\$2,451,544	\$8,219,997
(c) Estimated gain / loss, nominal dollars, 2013 → 2021 (8 years spanned)	2013– 2021	– \$7,711,909	–\$437,480	+ \$6,836,948

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	\$3,264,024	\$375,000	\$2,889,024	\$1,383,049 ... \$4,394,999	computed
2014	\$3,407,030	\$375,000	\$3,032,030	\$1,404,060 ... \$4,659,999	computed
2015	\$3,050,030	\$375,000	\$2,675,029	\$1,175,059 ... \$4,174,999	computed
2016	\$2,645,026	\$375,000	\$2,270,026	\$940,053 ... \$3,599,999	computed
2017	\$3,097,532	\$450,001	\$2,647,532	\$1,070,065 ... \$4,224,998	computed
2018	\$2,544,534	\$450,001	\$2,094,533	\$729,068 ... \$3,459,998	computed

2019	\$8,588,035	\$3,450,002	\$5,138,034	-\$2,188,930 ... computed \$12,464,997
2020	\$8,965,542	\$3,750,002	\$5,215,540	-\$2,433,917 ... computed \$12,864,997
2021	\$6,201,545	\$3,750,002	\$2,451,544	-\$3,316,910 ... computed \$8,219,997

- **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.)

+7.8%

SIMPLE AVERAGE OF
YEARS

+9.0%

YEARS ESTIMATED

4

BEST / WORST
SINGLE YEAR

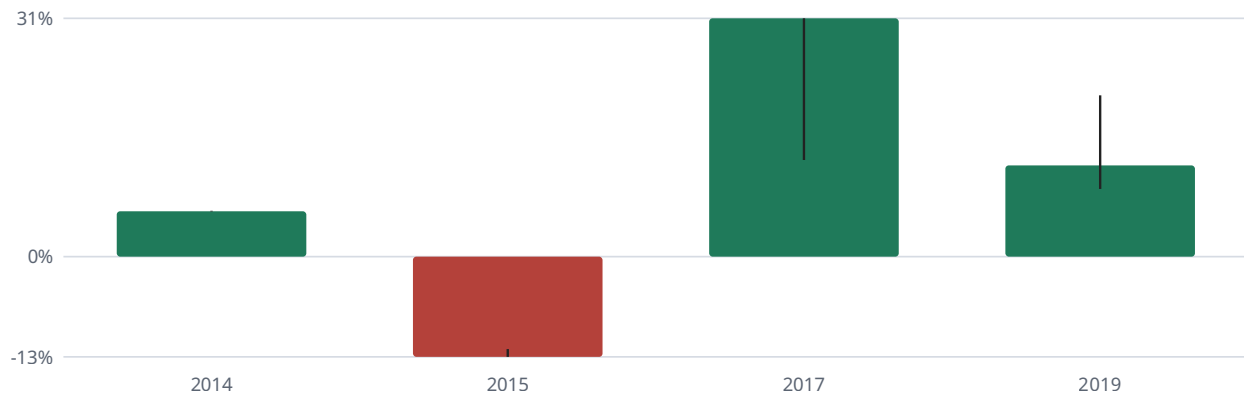
2017 +31%

2015 -13%

Reliability flags: few years (4); avg traced coverage 65%.

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +5.2% to +8.8%. 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	\$2,171,518	\$2,265,018	\$35,461	\$0	\$0	+5.9%	+5.9% ... +6.0%	-84% ... +96%	67%	counted
2014→2015	\$2,059,010	\$1,741,010	\$47,858	\$0	\$0	-13.1%	-15.4% ... -12.1%	-86% ... +60%	60%	counted
2015→2016	\$1,010,018	\$1,059,018	\$9,053	\$0	\$0	+5.7%	+5.4% ... +7.0%	-104% ... +115%	33%	excluded; not eligible: traced coverage 33% < 60%
2016→2017	\$1,950,022	\$1,974,522	\$584,204	\$0	\$0	+31.2%	+12.7% ... +38.1%	-85% ... +148%	74%	counted
2017→2018	\$1,192,510	\$967,010	\$37,502	\$0	\$0	-15.8%	-19.9% ... -14.0%	-93% ... +61%	38%	excluded; not eligible: traced coverage 38% < 60%
2018→2019	\$1,527,023	\$1,664,023	\$45,502	\$0	\$0	+12.0%	+8.9% ... +21.1%	-89% ... +113%	60%	counted

2019→2020	\$4,744,524	\$4,771,024	\$113,053	\$0	\$0	+2.9%	+2.7% ... +3.9%	-116% ... +122%	55%	excluded; not eligible: traced coverage 55% < 60%
2020→2021	\$5,138,533	\$2,703,533	\$128,854	\$0	\$0	-44.9%	-49.7% ... -25.9%	-129% ... +39%	57%	excluded; not eligible: traced coverage 57% < 60%

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	3f3719a7-f44c-41e1-ac0a-36cfefbfa4c4	Senate amendment	08/18/2015	49	0	Senate eFD report 893e2059262 379f0f20642 eb166c0130 a7189f18174 8aa3b4da932 f406c09cdb
2014	43dc3e1c-8c20-4fe0-a597-3177ada32d6a	Senate amendment	05/12/2016	60	0	Senate eFD report 5e908137417 864bdb3c85 e48834c2572 6d5291641e a0d8d2b200 b21ad02b5b5 0

2015	bca4a9a6-cde5-4f36-b899-de6e43fd2fba	Senate amendment	11/02/2018	59	0	Senate eFD report 0d3edb0bf88 6a8fe4da26 a8d6ed44165 3dcf3bb3364 f7ef4db76b5 e4d2edd83f
2016	c851c1fb-e85b-47a2-8d62-6974bd688dc0	Senate amendment	11/02/2018	53	0	Senate eFD report 977111df9d e20020c858 e683ec106e0 7fd981dc976 029bd3ccec6 cf6038c894c
2017	7531e28a-896e-4932-bd96-bcdbeeeab7c8	Senate amendment	11/02/2018	65	0	Senate eFD report fe60b68cec7 247b6105bb f0646a60db5 d5168049595 a3d161ad8f b0d2a16ea37
2018	fd2d77dc-ae08-4177-ae03-9763aefa8c57	Senate amendment	08/13/2020	68	0	Senate eFD report b633938352 c4597bcc7b6 d21a51cb316 58906e6cfa0 57b2f15b4b2 45ed93ccd4
2019	a9d1e921-dbc1-4de5-8f73-4c554b28f0c3	Senate annual	08/13/2020	70	0	Senate eFD report 5c9f4a04801 2f825c85e66 e1a2c5e343 db2684688f d0196e3e3d6 70c4b3f5fa6

2020	ed08e1bf-f25b-4651-81be-a197bfc1d162	Senate amendment	08/15/2022	83	0	Senate eFD report 0c47ae95024 bc4bdd6ee48 5fc2087522 ff1c76bbe5 db2ed6d7fd8 333d1ca0701
2021	015c1549-a85e-4a41-9263-5c27a2191fc9	Senate amendment	12/20/2022	90	0	Senate eFD report 99366cbdb9 d4bd6fab532 b2377612156 5c6aa42bd34 9e5e8811c76 965f2f009f

Largest movers 2014→2015

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Scottrade Joint Account 965 ⇒ PFS - Provident Financial Services, Inc. (NYSE)	JT	held	\$250,001 - \$500,000	\$15,001 - \$50,000	\$0	\$0
Morgan Stanley Traditional IRA K Toomey ⇒ IWF - iShares Russell 1000 Growth (NYSEArca)	SP	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
BPG Properties, LTD (multi-family private security investment fund) Description : Closed e	—	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$0
Portfolio Management Active Assets Account 389 ⇒ ICF - iShares Cohen & Steers REIT (NYSEAr	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Scottrade Joint Account 965 ⇒ AMLP - Alerian MLP ETF (NYSEArca)	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
N-35727, Inc.	—	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$0
Portfolio Management Active Assets Account 389 ⇒ PFF - iShares US Preferred Stock (NYSEArc	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Revere Bank	—	held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$0	\$0

Largest movers 2016→2017

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
BPG Multifamily Partnership, LP Company: Equus Capital Partners, Ltd. (Philadelphia, PA) D	—	held	\$100,001 - \$250,000	\$1,001 - \$15,000	\$0	\$0
Patriot Financial Partners II Company: Patriot Financial Partners, L.P. (Philadelphia, PA)	JT	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0
Morgan Stanley Traditional IRA 223 ⇒ QQQ-PowerShares QQQ Trust, Series 1 (NASDAQ)	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Equus Investment Partnership X, L.P. Company: Equus Capital Partners, Ltd. (Philadelphia,	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Scottrade Joint Account 965 ⇒ CAPL-CrossAmerica Partners LP (NYSE)	JT	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0
Morgan Stanley Traditional IRA K Toomey ⇒ IJR-iShares Core S&P Small-Cap	SP	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
Child #2 Scottrade Account ⇒ SPY-SPDR S&P 500 ETF	DC	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$0
Morgan Stanley Traditional IRA 544 ⇒ ILF-iShares Latin America 40	—	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0

Largest movers 2018→2019

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Patriot Financial Partners II Company: Patriot Financial Partners, L.P. (Philadelphia, PA)	JT	held	\$100,001 - \$250,000	\$50,001 - \$100,000	\$0	\$0
Morgan Stanley Traditional IRA 544 ⇒ AIV - Apartment Investment and Management Company	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Morgan Stanley Traditional IRA 223 ⇒ IJT - iShares S&P Small-Cap 600 Growth ETF	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Morgan Stanley Traditional IRA 223 ⇒ SPY - SPDR S&P 500 ETF	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Personal Loan to S. Toomey Debtor: Steve Toomey	—	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0

Morgan Stanley Traditional IRA K Toomey ⇒ QQQ - Invesco QQQ Trust Filer comment: This asse	SP	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Morgan Stanley Traditional IRA 223 ⇒ IJR - iShares Core S&P Small-Cap ETF	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Morgan Stanley Traditional IRA 223 ⇒ IJK - iShares S&P Mid-Cap 400 Growth ETF	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$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.