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GPO Member Guide)

Sen. Tom Udall (D-NM)

House / Senate · Democrat (most recent term) · NM · in Congress 1999–2021
· Bioguide ID U000039

Party history by chamber: House D 1999–2009, Senate D 2009–2021. 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 1999	2013	–\$108,957	\$1,690,520	\$3,489,996
(b) Latest net worth estimate	2019	\$1,173,029	\$2,759,014	\$4,344,998
(c) Estimated gain / loss, nominal dollars, 2013 → 2019 (6 years spanned)	2013– 2019	– \$2,316,967	+ \$1,068,494	+ \$4,453,955

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	\$3,190,522	\$1,500,002	\$1,690,520	–\$108,957 ... \$3,489,996	computed
2014	\$3,100,521	\$750,001	\$2,350,520	\$861,042 ... \$3,839,998	computed
2015	\$2,989,520	\$750,001	\$2,239,520	\$769,041 ... \$3,709,998	computed
2016	\$2,916,020	\$750,001	\$2,166,020	\$727,041 ... \$3,604,998	computed
2017	\$3,311,020	\$1,125,002	\$2,186,018	\$517,040 ... \$3,854,997	computed
2018	\$2,730,016	\$750,001	\$1,980,015	\$635,032 ... \$3,324,998	computed

2019	\$3,509,014	\$750,001	\$2,759,014	\$1,173,029 ... computed \$4,344,998
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- **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.)
+2.6%

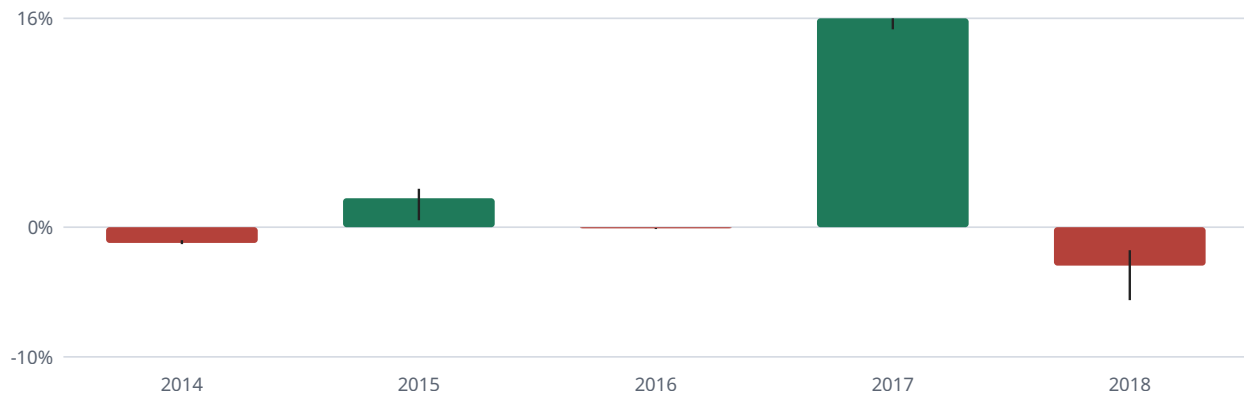
SIMPLE AVERAGE OF
YEARS
+2.8%

YEARS ESTIMATED
5

BEST / WORST
SINGLE YEAR
2017 +16%
2018 -3%

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +2.1% to +2.8%. 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	\$2,934,519	\$2,810,019	\$88,908	\$0	\$0	-1.2%	-1.3% ... -1.0%	-81% ... +78%	92%	counted
2014→2015	\$2,952,519	\$2,916,519	\$101,708	\$0	\$0	+2.2%	+0.5% ... +3.0%	-79% ... +84%	95%	counted
2015→2016	\$2,827,018	\$2,778,018	\$46,508	\$0	\$0	-0.1%	-0.1% ... -0.1%	-80% ... +80%	95%	counted
2016→2017	\$2,810,518	\$3,195,518	\$67,605	\$0	\$0	+16.1%	+15.3% ... +18.1%	-70% ... +102%	96%	counted
2017→2018	\$2,668,015	\$2,522,515	\$66,455	\$0	\$0	-3.0%	-5.6% ... -1.8%	-80% ... +74%	81%	counted
2018→2019	\$1,428,506	\$1,704,006	\$1,750	\$0	\$0	+19.4%	+18.6% ... +21.3%	-64% ... +103%	52%	excluded; not eligible: traced coverage 52% < 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	d75d13a1-7476-431d-88f6-e3d22889ee0c	Senate amendment	05/14/2015	43	0	Senate eFD report b5d3465 a7990f5 724867 bb3ced5 657f0b7 6830601 15c752 dcbf3e4 95e2c00 85f
2014	282060c5-62e7-4ec4-bcf5-bbc355021a2c	Senate annual	05/15/2015	42	0	Senate eFD report ca1fc97 4070578 124d239 4b932f6 798c601 17b415 f56aa77 182462 ae7ca21 8dc
2015	a728694c-dbd8-4ffb-88b4-9ab26aabf957	Senate amendment	05/15/2017	41	0	Senate eFD report a5e949 aade6b3 e318896 f10db3 abed2c6 df606a3 bdfdc1 5409c9 a5b38a4 860e

2016	b56d4562-2534-427d-a5da-848fad0b8e97	Senate annual	05/15/2017	41	0	Senate eFD report eb3f948 f11f2c0 910aa8 df14666 89d38a ca885d0 2f5e504 748ec25 f841e64 00e
2017	2e56e334-e227-47cf-9507-cc93e825fa53	Senate annual	05/15/2018	40	0	Senate eFD report 16f537 d3399a baea710 23e01a0 72234b afe9d1 d6b62c b5b49c3 ece4c3 f3b4803
2018	acef127b-77d8-412c-beeb-f0ba5a644165	Senate annual	04/30/2019	32	0	Senate eFD report 787249 bfdb2a d9aa662 a74a3b2 40209b2 38b79a0 839bb16 458ad8 de8def5 7f04

2019	5073d81d-9203-4235-8163-7bfb119c1b16	Senate annual	08/07/2020	29	0	Senate eFD report 0df6f95 991c34 f15088 b3cc774 6cdc1c d62d860 3085cf fe5ebd4 2ff9538 499f5
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Largest movers 2015→2016

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
United States Senate Federal Credit Union (Washington, DC) Type: Checking, Savings	JT	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$0
Jill Cooper SEP ⇒ NYVTX - Davis NY Venture A (NASDAQ)	SP	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ FRHIX - Franklin High Yield Tax-Free Inc A	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ AGTHX - American Funds Growth Fund of Amer	JT	held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$0	\$0
Jill Cooper SEP ⇒ AWPAX - AllianceBern Intl Growth A (NASDAQ)	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Northwestern Mutual Paid Up Life Insurance Provider: Northwestern Mutual	—	held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ Oppenheimer Main Street Core	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ ANWPX - American Funds New Perspective A (	JT	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)
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NM Public Employees Retirement Association ⇒ VINIX-Vanguard Institutional Index I (NASDAQ)	—	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ ANWPX-American Funds New Perspective A (NA	JT	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0
Tom Udall IRA ⇒ CWGIX-American Funds Capital World G/I A (NASDAQ)	—	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ PGNAX-Prudential Jennison Natural Resource	JT	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ GE-General Electric Company (NYSE)	JT	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0
Jill Cooper SEP ⇒ AEPGX-American Funds EuroPacific Gr A (NASDAQ)	SP	held	\$15,001 - \$50,000	\$50,001 - \$100,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ FRHIX-Franklin High Yield Tax-Free Inc A (	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ Cetera (Denver, CO) Type: Brokerage Sweep	JT	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0

Largest movers 2017→2018

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Tom Udall IRA ⇒ CWGIX-American Funds Capital World G/I A (NASDAQ)	—	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ PGNAX-Prudential Jennison Natural Resource	JT	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ RPAI-Retail Properties of America, Inc. (N	JT	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ CFWAX-Calvert Global Water A (NASDAQ)	JT	held	\$50,001 - \$100,000	\$15,001 - \$50,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ Cetera (Denver, CO) Type: Brokerage Sweep	JT	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0

Thomas S. & Jill Cooper Udall Revocable Trust ⇒ FRHIX-Franklin High Yield Tax-Free Inc A (	JT	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0
Thomas S. & Jill Cooper Udall Revocable Trust ⇒ BRK-B - Berkshire Hathaway Inc. (NYSE)	JT	held	\$50,001 - \$100,000	\$50,001 - \$100,000	\$0	\$0
NM Public Employees Retirement Association ⇒ New Mexico Stable Value Fund	—	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$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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