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GPO Member Guide)

Sen. Sheldon Whitehouse (D-RI)

Senate · Democrat (most recent term) · RI · in Congress 2007–present ·
Bioguide ID W000802

Party history: D 2007–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 2007	2013	\$2,395,239	\$5,877,618	\$9,359,998
(b) Latest net worth estimate	2025	\$11,220,256	\$22,635,126	\$34,049,996
(c) Estimated gain / loss, nominal dollars, 2013 → 2025 (12 years spanned)	2013– 2025	+ \$1,860,258	+ \$16,757,508	+ \$31,654,757

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	\$6,285,120	\$407,501	\$5,877,618	\$2,395,239 ... \$9,359,998	computed
2014	\$6,983,133	\$550,001	\$6,433,132	\$2,551,266 ... \$10,314,998	computed
2015	\$7,459,130	\$925,002	\$6,534,129	\$2,373,261 ... \$10,694,997	computed
2016	\$7,757,147	\$825,002	\$6,932,146	\$2,554,294 ... \$11,309,997	computed
2017	\$7,174,116	\$750,001	\$6,424,114	\$2,503,231 ... \$10,344,998	computed

2018	\$8,187,130	\$750,001	\$7,437,128	\$3,064,259 ... \$11,809,998	computed
2019	\$12,379,628	\$750,001	\$11,629,628	\$4,924,257 ... \$18,334,998	computed
2020	\$14,532,134	\$750,001	\$13,782,134	\$6,304,269 ... \$21,259,998	computed
2021	\$17,628,631	\$750,001	\$16,878,630	\$8,302,262 ... \$25,454,998	computed
2022	\$14,253,154	\$750,001	\$13,503,153	\$5,841,308 ... \$21,164,998	computed
2023	\$14,891,150	\$925,002	\$13,966,148	\$6,977,300 ... \$20,954,997	computed
2024	\$21,361,634	\$525,002	\$20,836,632	\$9,978,268 ... \$31,694,997	computed
2025	\$23,235,128	\$600,002	\$22,635,126	\$11,220,256 ... \$34,049,996	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.)

SIMPLE AVERAGE OF
YEARS

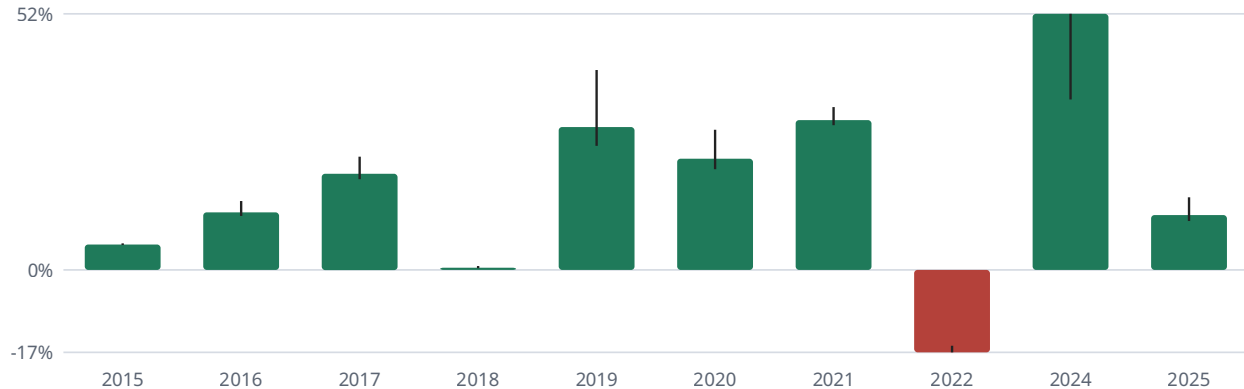
YEARS ESTIMATED
10

BEST / WORST
SINGLE YEAR

+15.1%**+16.5%****2024 +52%**
2022 -17%

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +15.9% to +14.8%. 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	\$3,086,560	\$3,413,060	\$41,225	\$0	\$0	+11.9%	+9.7% ... +19.0%	-97% ... +121%	49%	excluded; not eligible: traced coverage 49% < 60%
2014→2015	\$5,771,102	\$5,969,102	\$99,003	\$0	\$0	+5.1%	+5.1% ... +5.4%	-100% ... +110%	83%	counted
2015→2016	\$5,405,102	\$5,955,102	\$81,696	\$0	\$0	+11.7%	+11.0% ... +14.0%	-98% ... +121%	72%	counted
2016→2017	\$5,190,588	\$6,128,088	\$76,639	\$0	\$0	+19.5%	+18.4% ... +23.0%	-91% ... +130%	67%	counted

2017→2018	\$6,581,101	\$6,523,601	\$87,396	\$0	\$0	+0.5%	+0.3% ... +0.8%	-101% ... +102%	92%	counted
2018→2019	\$6,636,102	\$8,447,602	\$113,450	\$0	\$0	+29.0%	+25.2% ... +40.6%	-81% ... +139%	81%	counted
2019→2020	\$8,703,612	\$10,562,112	\$107,847	\$0	\$0	+22.6%	+20.5% ... +28.5%	-79% ... +124%	70%	counted
2020→2021	\$10,264,114	\$13,166,614	\$219,066	\$0	\$0	+30.4%	+29.4% ... +33.1%	-70% ... +131%	71%	counted
2021→2022	\$13,129,584	\$10,839,084	\$94,480	\$0	\$0	-16.7%	-20.6% ... -15.4%	-108% ... +74%	74%	counted
2022→2023	\$8,371,090	\$10,569,090	\$87,930	\$0	\$0	+27.3%	+25.5% ... +32.0%	-72% ... +127%	59%	excluded; not eligible: traced coverage 59% < 60%
2023→2024	\$13,371,121	\$20,166,621	\$157,303	\$0	\$0	+52.0%	+34.6% ... +58.8%	-68% ... +172%	90%	counted
2024→2025	\$20,638,119	\$22,803,619	\$133,345	\$0	\$0	+11.1%	+9.9% ... +14.7%	-92% ... +114%	97%	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
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2013	28350cb4-1aa9-4d9d-981e-9e92d46e167b	Senate amendment	08/12/2015	239	0	Senate eFD report 18649d0 212835 ad76ae c458e0 d6fb238 c8b59b8 b755467 ab4019 b05b0b3 5c925
2014	45638ae1-f073-4ac0-ad2d-1da67039e611	Senate annual	08/13/2015	266	0	Senate eFD report 65b59f7 bc0ee05 16af21 ed25bc3 b141ef f640e5 b2d77b ebd8278 c167e59 e8a16
2015	947d0bc1-23b0-47be-bd28-60421a653fdc	Senate amendment	09/08/2016	261	0	Senate eFD report 59e3656 9547269 05190d9 6fff713 29a9794 7b184c a469a31 afdd411 d895bd1 68

2016	cb5e44c0-de0e-47b4-bd47-e7b06bf1af32	Senate annual	08/11/2017	294	0	Senate eFD report 5f70f6 b9057b b697d2 e501c97 12aae7 e536fb cc20d4 b109aa cc7bd79 727fab f9
2017	89e65ebd-bb71-4f4b-ae0b-52255fe2667a	Senate amendment	08/12/2019	231	0	Senate eFD report e3c456 c240651 d5bdcf0 2a7e1c3 c338727 de0dfd a085cd2 83aaa8 a2dd327 4646
2018	90bbaba1-dccc-4935-bb20- ca6eb3220b0b	Senate annual	08/12/2019	259	0	Senate eFD report 9fe6092 c160059 aec721 da5e148 3898ac ed5624 b5e5d44 c80e9a4 05c340 ab461

2019	7a484137-c313-41d5-9ad4-8f0780b3a685	Senate amendment	03/01/2021	257	0	Senate eFD report 4965e1 a826a7 be7a103 ea86af4 b1a0c98 beeec28 ce7d05 f87bde bdf4952 115a2
2020	326a471d-d6a2-47e8-92f2-2a72eff6dffc	Senate annual	08/10/2021	269	0	Senate eFD report 640a50 df17a0 c25073 e4c1ad0 59b17f d807725 502519 f05a1d3 ab75fd3 6d5c89
2021	401a8da0-a664-4253-935d-ce551a034c09	Senate annual	08/11/2022	262	0	Senate eFD report 24dcfe3 57f4281 7821c91 a5e31c be79363 9f95b54 962ae11 a01d5c3 e210414 c0

2022	4acf84a7-642b-458c-aed9-8e272d9c8e57	Senate amendment	09/27/2023	308	0	Senate eFD report 0e3dc34 946569 f19b81 cac5aa e182841 47c60f dc70701 b90f60 d9168a dfe8e9c
2023	1eb0d806-fa8f-44bd-a693-910e67cad938	Senate annual	08/13/2024	300	0	Senate eFD report be075c0 e990227 5c9ce65 4b4a39 f3aa7c3 958110 a57366 a0766b c0de508 c204a
2024	fc85ab38-07e9-452d-8416-91636fd3f7ee	Senate annual	08/12/2025	268	0	Senate eFD report 6cab8a f34778 e8fd132 4c52a75 35ced87 72d162 aeea3d1 51b0e33 fac46b2 dd67

2025	6c73943b-bc2e-46d8-8a6b-2e77768a24c8	Senate annual	08/10/2026	256	0	Senate eFD report 9ffeb7a46009a424f2446ba83956d82038518e4e52302b7b193d7fd2aea43556
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Largest movers 2021→2022

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ AMZN-Amazon.com Inc. (NASDAQ)	—	held	\$500,001 - \$1,000,000	\$250,001 - \$500,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ GOOGL - Alphabet Inc.	—	held	\$500,001 - \$1,000,000	\$250,001 - \$500,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ HD-The Home Depot, Inc.	—	held	\$250,001 - \$500,000	\$100,001 - \$250,000	\$0	\$0
Morgan Stanley [1] ⇒ Morgan Stanley (Newport, RI) Type: Money Market Account	JT	held	\$100,001 - \$250,000	\$15,001 - \$50,000	\$0	\$0
Morgan Stanley SEP IRA ⇒ NVDA-NVIDIA Corporation	SP	held	\$100,001 - \$250,000	\$50,001 - \$100,000	\$0	\$0
Morgan Stanley SEP IRA ⇒ AMZN-Amazon.com, Inc.	SP	held	\$100,001 - \$250,000	\$50,001 - \$100,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ UNP-Union Pacific Corporation (NYSE)	—	held	\$100,001 - \$250,000	\$50,001 - \$100,000	\$0	\$0
Morgan Stanley SEP IRA ⇒ NFLX - Netflix, Inc.	SP	held	\$100,001 - \$250,000	\$50,001 - \$100,000	\$0	\$0

Largest movers 2023→2024

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
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Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ NVDA-NVIDIA Corporation	—	held	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ AAPL-Apple Inc.	—	held	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ AMZN-Amazon.com Inc. (NASDAQ)	—	held	\$250,001 - \$500,000	\$500,001 - \$1,000,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ NFLX-Netflix, Inc.	—	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Morgan Stanley-Sandra Whitehouse Tr-2004 ⇒ NVDA - NVIDIA Corporation - Common Stock	SP	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Tr-2004 ⇒ NVDA - NVIDIA Corporation - Common Stock	—	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ V-Visa Inc. (NYSE)	—	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Bank of America (Newport, RI) Type: Checking	SP	held	\$100,001 - \$250,000	\$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)
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ GOOGL - Alphabet Inc.	—	held	\$250,001 - \$500,000	\$500,001 - \$1,000,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ UNH-UnitedHealth Group Incorporated (NYS	—	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ GS-The Goldman Sachs Group, Inc.	—	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ LRCX-Lam Research Corporation	—	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Morgan Stanley SEP IRA ⇒ GOOGL - Alphabet Inc.	SP	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0
Morgan Stanley SEP IRA ⇒ LRCX - Lam Research Corporation	SP	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0

Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ BAC-Bank of America Corporation	—	held	\$50,001 - \$100,000	\$100,001 - \$250,000	\$0	\$0
Morgan Stanley- Sheldon Whitehouse Family Trust ⇒ PG - The Procter & Gamble Company (NYSE)	—	held	\$100,001 - \$250,000	\$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.