



Return to the search tab to select another report.

Annual Report for Calendar 2024

The Honorable Charles E Schumer (Schumer, Charles E.)

Filed 05/15/2025 @ 1:45 PM

[Print Report](#)

The following statements were checked before filing:

- I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.
- I *omitted* assets because they meet the three-part test for exemption.

Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance? **No**

Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Self	Salary	US Senate Washington, DC	\$193,400.00	n/a
2	Spouse	Salary	The New York Public Library New York, NY	> \$1,000	n/a

Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

Asset	Asset Type	Owner	Value	Income Type	Income
-------	------------	-------	-------	-------------	--------

	Asset	Asset Type	Owner	Value	Type	Income
1	Congressional Federal Credit Union (Washington, DC) <i>Type:</i> Certificate of Deposit, Savings,	Bank Deposit	Owner	\$100,001 - \$250,000	Interest,	Income \$201
2	Municipal Credit Union (New York, NY) <i>Type:</i> Checking, Savings,	Bank Deposit	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
3	Teachers Retirement System Deferred Compensation <i>Company:</i> Craig James Financial Services, LLC (Melville, NY) <i>Description:</i> deferred compensation	Deferred Compensation	Spouse	\$100,001 -\$250,000	Excepted Investment Fund,	None (or less than \$201)
4	New York State Voluntary Defined Contribution Program	Retirement Plans Defined Contribution Pension Plan	Spouse			
4.1	TIAA Traditional <i>Provider:</i> TIAA-CREF	Annuity Fixed	Spouse	\$100,001 -\$250,000	Excepted Investment Fund,	None (or less than \$201)
4.2	TI Acc Ddg&Cox Intl St T1 <i>Filer comment:</i> Fund name changed. Previously reported as TIAA Acc-D&C Intl Stk T1	Mutual Funds Mutual Fund	Spouse	\$15,001 -\$50,000	Excepted Investment Fund,	None (or less than \$201)
4.3	TI Acc Vang SmCpVa Ix T1 <i>Filer comment:</i> Fund name changed. Previously reported as TIAA Acc-VAN SmCpVa Ix T1	Mutual Funds Mutual Fund	Spouse	\$15,001 -\$50,000	Excepted Investment Fund,	None (or less than \$201)
4.4	CREF Inf-Linked Bond R3	Mutual Funds Mutual Fund	Spouse	\$15,001 -\$50,000	Excepted Investment Fund,	None (or less than \$201)
4.5	QCM MIX - CREF Money Market Account - R3	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
4.6	TI Acc Vang Wellington T1 <i>Filer comment:</i> Fund name changed. Previously reported as TIAA Acc-VAN Wellington T1	Mutual Funds Mutual Fund	Spouse	\$15,001 -\$50,000	Excepted Investment Fund,	None (or less than \$201)
4.7	QCGRIX - CREF Growth Account - R3	Mutual Funds Mutual Fund	Spouse	\$15,001 -\$50,000	Excepted Investment Fund,	None (or less than \$201)
4.8	QREARX - TIAA Real Estate Account	Mutual Funds Mutual Fund	Spouse	\$15,001 -\$50,000	Excepted Investment Fund,	None (or less than \$201)
4.9	TI Acc Nuv Lg Cap VI Ix T1 <i>Filer comment:</i> Fund name changed. Previously reported as TIAA Acc Lg-Cap Val Ix T1	Mutual Funds Mutual Fund	Spouse	\$15,001 -\$50,000	Excepted Investment Fund,	None (or less than \$201)

4.10	QCBMIX - CREF Bond Market Account - R3 Asset	Mutual Funds Mutual Fund Asset Type	Spouse Owner	\$50,001 Value \$100,000	Excepted Income Investment Type Fund,	None (or less than Income \$201)
4.11	TI Acc Vang Ext Mkt Ix T1	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
4.12	TI Acc Vang Inst Ix T1	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
4.13	TI Acc Vang Treas MMkt T1	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
4.14	TI Acc Americ EurPc Gr T1 - SUNY Targeted Allocation Retirement Series-Lifecycle 2020	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
4.15	TI Acc Vang Inst Ix PI T1 - SUNY Targeted Allocation Retirement Series-Lifecycle 2020	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
4.16	TI Acc Vang TlntBd Ix T1 - SUNY Targeted Allocation Retirement Series-Lifecycle 2020	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
5	Pensco Trust Company IRA	Retirement Plans IRA	Self			
5.1	Pensco Trust Company (San Francisco, CA) Type: IRA Cash Accounts,	Bank Deposit	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
6	Pensco Trust Company IRA	Retirement Plans IRA	Spouse			
6.1	Pensco Trust Company (San Francisco, CA) Type: IRA Cash Accounts,	Bank Deposit	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
7	City University of New York Tax Deferred Annuity Plan	Retirement Plans Defined Contribution Pension Plan	Spouse			
7.1	TIAA Traditional Provider: TIAA-CREF	Annuity Fixed	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
7.2	TI Acc Nuv Lg Cp VI Ix T1 Filer comment: Fund name changed. Previously reported	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment	None (or less than

	<i>Filer comment:</i> Fund name changed. Previously reported as TIAA Acc Lg-Cap Val Ix T1	Mutual Funds	Spouse	\$15,000	Investment Fund,	less than \$201)
	Asset	Asset Type	Owner	Value	Type	Income
7.3	TI Acc Nuv Sm Cp BI Ix T1 <i>Filer comment:</i> Fund name changed. Previously reported as TIAA Acc Sm-Cap BI Ix T1	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
7.4	TI Acc Americ WaMu Inv T1 <i>Filer comment:</i> Fund name changed. Previously reported as TIAA Acc-AF WaMu Inv T1	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
7.5	TI Acc Americ EuroPac Gr T1 <i>Filer comment:</i> Fund name changed. Previously reported as TIAA Acc AF EuroPac Gr T1	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
7.6	QREARX - TIAA Real Estate Account	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
7.7	QCBMIX - CREF Bond Market Account - R3	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
7.8	CREF Inf-Linked Bond R3	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
7.9	TI Acc WstAst Cr PI Bd T1 <i>Filer comment:</i> Fund name changed. Previously reported as TIAA Acc-WAM Cr PI Bd T1	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
7.10	QCSCIX-CREF Social Choice Account - R3	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
8	New York Public Library TDA Plan	Retirement Plans Defined Contribution Pension Plan	Spouse			
8.1	TIAA Traditional <i>Provider:</i> TIAA-CREF	Annuity Fixed	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
8.2	QCGRPX-CREF Growth Account - R2	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
8.3	Nuveen Intl Eq-Rtmt <i>Filer comment:</i> Fund name changed. Previously reported as T-C Intl Eq-Rtmt.	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
8.4	Nuveen Lg-Cap Val-Rtmt <i>Filer comment:</i> Fund name changed. Previously reported as T-C Lg-Cap Val-Rtmt	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)

8.5	Nuveen Mid Cap Val Rtmt Asset <i>Filer comment:</i> Fund name changed. Previously reported as T-C Mid-Cap Val-Rtmt	Mutual Funds Asset Type Mutual Fund	Spouse Owner	\$15,001 Value - \$50,000	Income Excepted Type Investment Fund,	None (or Income less than \$201)
8.6	Nuveen Lg-Cap Val Idx-Rtmt <i>Filer comment:</i> Fund name changed. Previously reported as T-C Lg-Cap Val Idx-Rtmt	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
8.7	Nuv Qnt Sm-Cap Eq-Rtmt <i>Filer comment:</i> Fund name changed. Previously reported as T-C Sm-Cap Eq-Rtmt	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
8.8	Nuveen Em Mrkts Eq Rtmt <i>Filer comment:</i> Fund name changed. Previously reported as T-C Emrg Mrkts Eq- Rtmt	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
8.9	QREARX - TIAA Real Estate Account	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
8.10	Nuveen High-Yield-Rtmt <i>Filer comment:</i> Fund name changed. Previously reported as T-C High-Yield-Rtmt	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
8.11	Nuveen Short-Term Bond-Rtmt <i>Filer comment:</i> Fund name changed. Previously reported as T-C Short-Term Bond-Rtmt	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
8.12	Nuveen Infl Link Bd Rtmt <i>Filer comment:</i> Fund name changed. Previously reported as T-C Infl-Lnkd Bond-Rtmt	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
8.13	Nuveen Core Bond Rtmt <i>Filer comment:</i> Fund name changed. Previously reported as T-C Bond-Rtmt	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
8.14	Nuveen Core Imp Bond Rtmt <i>Filer comment:</i> Fund name changed. Previously reported as T-C Core Impact Bond- Rtmt	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
9	Citibank (New York, NY) <i>Type:</i> Certificate of Deposit, Savings,	Bank Deposit	Joint	\$15,001 - \$50,000	None,	None (or less than \$201)
10	NEH 3 LLC <i>Company:</i> NEH 3 LLC (Brooklyn, NY) <i>Description:</i> Writer <i>Filer comment:</i> Entity established to receive income from book pursuant to agreement listed on Part 9, line 2.	Business Entity Limited Liability Company (LLC)	Spouse	\$15,001 - \$50,000	Other, (Ordinary Business Income)	Other \$15,001.00
11	NEH 3 LLC <i>Company:</i> NEH 3 LLC (Brooklyn, NY) <i>Description:</i> Writer <i>Filer comment:</i> Entity established to receive income from book pursuant to agreement listed	Business Entity Limited Liability	Self	\$15,001 - \$50,000	Other, (Ordinary Business Income)	Other \$15,001.00

to receive income from book pursuant to agreement listed on Part 9, line 2.
Asset

Liability
Company
(Asset) Type

Owner

Value

Income
Income
Type

Income

		Asset Type	Owner	Value	Income Type	Income
12	TIAA Brokerage DGMMM - Dreyfus Govt Cash Mgmt Investor Shs (Charlotte, NC) <i>Type: Money Market Account,</i>	Bank Deposit	Joint	\$50,001 - \$100,000	Interest,	\$201 - \$1,000

Part 4a. Periodic Transaction Report Summary

In this section, electronically filed periodic transaction report (PTR) transactions are displayed for you.

Part 4b. Transactions

Did you, your spouse, or dependent child buy, sell, or exchange an asset where the transaction exceeded \$1,000 and was not reported on Part 4a? **Yes**

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
1	Spouse	--	TI Acc T-C LifCyc 2015 T1	Sale (Full)	07/03/2024	\$1,001 - \$15,000	Portfolio realignment in retirement account.
2	Spouse	--	TI Acc Americ EurPc Gr T1 - SUNY Targeted Allocation Retirement Series- Lifecycle 2020	Purchase	07/30/2024	\$15,001 - \$50,000	Portfolio realignment in retirement account
3	Spouse	--	TI Acc Vang Inst Ix PI T1 - SUNY Targeted Allocation Retirement Series- Lifecycle 2020	Purchase	07/03/2024	\$15,001 - \$50,000	Portfolio realignment in retirement fund
4	Spouse	--	TI Acc Vang TtIntBd Ix T1 - SUNY Targeted Allocation Retirement Series- Lifecycle 2020	Purchase	07/30/2024	\$1,001 - \$15,000	Portfolio realignment in retirement account

Part 5. Gifts

Did you, your spouse, or dependent child receive any reportable gift during the reporting period? **No**

Part 6. Travel

Did you, your spouse, or dependent child receive any reportable travel? **No**

Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting

period? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2017	Joint	Mortgage	0	4.125% (30 years)	\$100,001 - \$250,000	Citibank New York, NY	n/a

Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **Yes**

#	Position Dates	Position Held	Entity	Entity Type	Comments
1	Mar 2024 to present	Other (Member)	NEH 3 LLC Brooklyn, NY	Other (Limited Liability Company)	n/a

Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **Yes**

#	Date	Parties Involved	Type	Status and Terms	Comments
1	Jan 2008	Rodale, Inc. Emmaus, PA	Royalty Agreement	Pursuant to agreement with Rodale, Inc., in 2007 Senator Schumer authored a book entitled "Positively American." Under the terms of the agreement the Senator received an advance (disclosed in 2007 report) against royalties and is entitled to receive ongoing standard royalties. The above agreement was reviewed and approved by the Senate Ethics Committee in advance.	n/a
2	May 2024	Grand Central Publishing, a division of Hachette Book Group, Inc. New York, NY	Royalty Agreement	Agreement for an advance and royalties based on customary and usual terms for book, "Antisemitism in America: A Warning." The above agreement was reviewed and approved by the Senate Ethics Committee in advance.	n/a

Part 10. Compensation

Only required if you are a candidate or this is your first report Did any person or entity pay more than \$5,000 to you or for services provided by you? **This is not my first report.**

Attachments & Comments

No attachments added.

No comments added.