

000000000175 RECEIVED BY: SECRETARY OF THE SENATE Date: May 15, 2024

UNITED STATES SENATE FINANCIAL DISCLOSURE REPORT FOR ANNUAL AND TERMINATION FILERS

Amendment

Last Name	First Name and Middle Initial	Annual Report	
Markey	Edward	Calendar Year Covered by Report	Senate Office / Agency in Which Employed
		2023	Senator Edward J. Markey
Senate Office Address (Number, Street, City, State, and ZIP Code)	Senate Office Telephone Number (Include Area Code)	Termination Report	
255 Dirksen Senate Office Building	202-224-2742	Termination Date (mm/dd/yy)	Prior Office / Agency in Which Employed

AFTER READING THE INSTRUCTIONS – ANSWER EACH OF THESE QUESTIONS AND ATTACH THE RELEVANT PART

	YES	NO		YES	NO
Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article in the reporting period? If Yes, complete and attach PART I.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Did you, your spouse, or dependent child receive any reportable travel or reimbursements for travel in the reporting period (i.e., worth more than \$480 from one source)? If Yes, complete and attach PART VI.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you or your spouse have earned income (e.g., salaries or fees) or non-investment income totaling \$200 or more from any reportable source in the reporting period? If Yes, complete and attach PART II.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Did you, your spouse, or dependent child have any reportable liability (i.e., more than \$10,000) during the reporting period? If Yes, complete and attach PART VII.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Did you, your spouse, or dependent child hold any reportable asset worth more than \$1,000 at the end of the period, or receive unearned or investment income of more than \$200 in the reporting period? If Yes, complete & attach PART IIIA and/or IIIB.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Did you hold any reportable positions on or before the date of filing in the current calendar year? If Yes, complete and attach PART VIII.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset worth more than \$1,000 in the reporting period? If Yes, complete and attach PART IV.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Do you have any reportable agreement or arrangement with an outside entity? If Yes, complete and attach PART IX.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Did you, your spouse, or dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$480 and not otherwise exempt)? If Yes, complete and attach PART V.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	If this is your FIRST Report: Did you receive compensation of more than \$5,000 from a single source in the <u>two</u> prior years? If Yes, complete and attach PART X.	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Each question must be answered and the appropriate PART attached for each "YES" response.

	<p>FOR OFFICIAL-USE ONLY Do Not Write Below this Line</p> <p style="font-size: small; color: blue;">RECEIVED SECRETARY OF THE SENATE RECORDS MAY 15 AM 11:23</p>
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Reporting Individual's Name	<input type="checkbox"/> Amendment	PART II. EARNED AND NON-INVESTMENT INCOME	Page Number 1
Edward J. Markey			

Report the source (name and address), type, and amount of earned income to you from any source aggregating \$200 or more during the reporting period. For your spouse, report the source (name and address) and type of earned income which totals more than \$1,000 during the reporting period. No amount needs to be specified for your spouse (see Financial Disclosure Instructions for CY 2023, p. 18). Do not report income from employment by the U.S. Government for you or your spouse.

Individuals not covered by the Honoraria Ban: For you and/or your spouse, report honoraria income received which aggregates \$200 or more by exact amount, give the date of, and describe the activity (speech, appearance or article) generating such honoraria payment. Do **not** include payments in lieu of honoraria reported on Part I.

Name of Income Source		Address (City, State)	Type of Income	Amount
Example:	<i>JP Computers</i>	<i>Wash., DC</i>	EXAMPLE	<i>Salary</i>
	<i>MCI (Spouse)</i>	<i>Arlington, VA</i>	EXAMPLE	<i>Over \$1,000</i>
1	U.S. Public Health Service, (U.S. Coast Guard) – (Spouse)	Topeka, KS	Spouse Pension	Over \$1,000
2	Global Health Institute, LLC including medical services (Spouse)	Chevy Chase, MA	Spouse Salary	Over \$1,000
3	Morgan Stanley IRA	New York City, NY	Mandatory IRA Distribution	\$6,000
4	National Financial Services, LLC (Fidelity Investments)- (Spouse)	Jersey City, NJ	Spouse Mandatory IRA Distribution	Over \$1,000
5	TIAA Administrative Services, LLC- 403B – (Spouse)	Charlotte, NC	Spouse Mandatory 403B Distribution	Over \$1,000
6				
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Reporting Individual's Name Edward J. Markey	<input type="checkbox"/> Amendment	PART IIIA. PUBLICLY TRADED ASSETS AND UNEARNED INCOME SOURCES	Page Number 2
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BLOCK A Identity of Publicly Traded Assets And Unearned Income Sources	BLOCK B Valuation of Assets <small>At the close of reporting period. If None, or less than \$1,001, check the first column.</small>										BLOCK C Type and Amount of Income																						
											Type of Income					Amount of Income					Actual Amount Required if "Other" Specified												
											None	Dividends	Rent	Interest	Capital Gains	None (or less than \$201)	\$201 - \$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000		\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	Over \$1,000,000								
Report the complete name of each publicly traded asset held by you, your spouse, or your dependent child (see Financial Disclosure Instructions for CY 2023, p. 20) for production of income or investment which: (1) had a value exceeding \$1,000 at the close of the reporting period; and/or (2) generated over \$200 in "unearned" income during the reporting period. Include on PART IIIA a complete identification of each public bond, mutual fund, publicly traded partnership interest, excepted investment fund, bank account, excepted and qualified blind trust, and publicly traded asset of a retirement plan.	None (or less than \$1,001)	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000	None	Dividends	Rent	Interest	Capital Gains	Excepted Investment Fund	Excepted Trust	Qualified Blind Trust	Other (Specify Type)	None (or less than \$201)	\$201 - \$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	Over \$5,000,000	Example
Example: S, IBM Corp. (stock) or J (S) Keystone Fund			X										X					X		Example	X										Example		
1 (S) Fidelity Mass Muni Income Mutual Fund			X															X		Example	X										Example		
2 (S) Fidelity Government Money Market Fund (Core Acct)			X															X		Example		X									Example		
3 (S) Fidelity SEP-Fidelity Government Cash Reserves Money Market Fund	X																	X		Example	X										Example		
4 (S) Fidelity SEP-Invesco QQQ Trust Series 1			X															X		Example	X										Example		
5 (S) Fidelity SEP-SPDR S+P 500 ETF Trust Unit Series 1		X																X		Example	X										Example		
6 (S) Fidelity SEP-Fidelity Extended Market Mutual Fund (name change)			X															X		Example	X										Example		
7																				Example											Example		
8																				Example											Example		
9																				Example											Example		
10																				Example											Example		

EXEMPTION TEST (see Financial Disclosure Instructions for CY 2023): If you omitted any asset because it meets the three-part test for exemption described in the instructions, please check box to the right. This category applies only if the asset is/was held independently by the spouse or dependent child. If the asset is/was either held by the filer or jointly held, use the other categories of value, as appropriate.

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Reporting Individual's Name Edward J. Markey	<input type="checkbox"/> Amendment	PART IIIA. PUBLICLY TRADED ASSETS AND UNEARNED INCOME SOURCES	Page Number 3
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BLOCK A Identity of Publicly Traded Assets And Unearned Income Sources	BLOCK B Valuation of Assets <small>At the close of reporting period. If None, or less than \$1,001, check the first column.</small>								BLOCK C Type and Amount of Income																								
									Type of Income						Amount of Income																		
									None	Dividends	Rent	Interest	Capital Gains	Excepted Investment Fund	Excepted Trust	Qualified Blind Trust	Other <small>(Specify Type)</small>	None (or less than \$201)	\$201 - \$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	Over \$5,000,000	Actual Amount Required if "Other" Specified				
Report the complete name of each publicly traded asset held by you, your spouse, or your dependent child (see Financial Disclosure Instructions for CY 2023, p. 20) for production of income or investment which: (1) had a value exceeding \$1,000 at the close of the reporting period; and/or (2) generated over \$200 in "unearned" income during the reporting period. Include on PART IIIA a complete identification of each public bond, mutual fund, publicly traded partnership interest, excepted investment fund, bank account, excepted and qualified blind trust, and publicly traded asset of a retirement plan.	None (or less than \$1,001)	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000	None	Dividends	Rent	Interest	Capital Gains	Excepted Investment Fund	Excepted Trust	Qualified Blind Trust	Other <small>(Specify Type)</small>	None (or less than \$201)	\$201 - \$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	Over \$5,000,000	Actual Amount Required if "Other" Specified
Example: S, IBM Corp. (stock) DC, or J (S) Keystone Fund			X										X							Example	X										Example		
				X																Example	X										Example		
1 Fidelity Cash Core Account	X												X									X											
2 IRA Morgan Stanley-Invesco QQQ Trust Series 1				X														X				X											
3 (S) Fidelity-Victory R.S. Small Cap Growth Class A Mutual Fund					X													X				X											
4 (S) Fidelity-Rydex NASDAQ 100 Inv Class Mutual Fund								X										X				X											
5 Fidelity-Rydex NASDAQ 100 Inv Class Mutual Fund						X												X				X											
6 (S) TIAA Retirement Annuity -CREF Equity Index R3 (name change)							X											X				X											
7 (S) TIAA Traditional Retirement Annuity					X													X				X											
8 (S) Fidelity 500 Index Fund					X													X															
9 (S) Fidelity SEP-Fidelity 500 Index Fund							X											X				X											
10 (S) Fidelity-Invesco QQQ Trust-Series 1		X																X				X											

EXEMPTION TEST (see Financial Disclosure Instructions for CY 2023): If you omitted any asset because it meets the three-part test for exemption described in the instructions, please check box to the right. This category applies only if the asset is/was held independently by the spouse or dependent child. If the asset is/was either held by the filer or jointly held, use the other categories of value, as appropriate.

Reporting Individual's Name Amendment **PART IV. TRANSACTIONS** Page Number
 Edward J. Markey 5

Report any purchase, sale, or exchange by you, your spouse, or dependent child (see Financial Disclosure Instructions for CY 2023, p. 30) during the reporting period of any real property, stocks, bonds, commodity futures, and other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Do not report a transaction involving property used solely as your personal residence, or a transaction between you, your spouse, or dependent child. Please clarify which two assets are involved in any reportable exchange.

Identification of Assets	Transaction Type (x)			Transaction Date (Mo., Day, Yr.)	Amount of Transaction (x)										
	Purchase	Sale	Exchange		\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000
Example: S, DC, or J IBM Corp. (stock) NYSE	X			2 / 1 / 2X		X			E	X	A	M	P	L	E
(DC) Microsoft (stock) NASDAQ/OTC		X		1 / 27 / 2X			X	E	X	A	M	P	L	E	
1 IRA Morgan Stanley – Invesco QQQ Trust-Series 1		X		12/5/23	X										
2 (S) Fidelity SEP-Fidelity 500 Index Fund	X			4/17/23	X										
3 (S) Fidelity SEP-Fidelity Asset Manager 20% Mutual Fund		X		12/18/23	X										
4 (S) TIAA Traditional Retirement Annuity		X		7/3/23	X										
5 (S) TIAA Retirement Annuity-CREF Equity Index R3 (name change)		X		7/3/23		X									
6 (S) Fidelity SEP-Fidelity 500 Index Fund	X			12/18/23	X										
7 (S) Fidelity SEP-Fidelity Extended Market Index Fund		X		12/18/23		X									
8															
9															
10															
11															
12															

EXEMPTION TEST (see Financial Disclosure Instructions for CY 2023): If you omitted any asset because it meets the three-part test for exemption described in the instructions, please check box to the right. This category applies only if the asset is/was held independently by the spouse or dependent child. If the asset is/was either held by the filer or jointly held, use the other categories of value, as appropriate.

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Reporting Individual's Name	<input type="checkbox"/> Amendment	PART VII. LIABILITIES	Page Number
Edward J. Markey			6

Report liabilities over \$10,000 owed by you, your spouse, or dependent child (see Financial Disclosure Instructions for CY 2023, p. 37), to any one creditor at any time during the reporting period. Check the highest amount owed during the reporting period.

Exclude: (1) mortgages on your personal residences unless rented (**except for Senators**); (2) loans secured by automobiles, household furniture or appliances; and (3) liabilities owed to certain relatives listed in the instructions. For more information on reporting revolving charge accounts, see Financial Disclosure Instructions for CY 2023.

Name of Creditor	Address	Type of Liability	Date Incurred	Interest Rate	Discount Points Paid for Mortgage (Senators Only)	Term if Applicable	Category of Amount											
							\$10,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000***	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000	
<i>Example:</i> S, DC, or J	<i>First District Bank</i>	<i>Wash., DC</i>	<i>Mortgage on undeveloped land</i>	<i>2012</i>	<i>13%</i>	<i>1 pt</i>	<i>25 yrs</i>			X		E	X	A	M	P	L	E
	<i>(J) John Jones</i>	<i>Wash., DC</i>	<i>Promissory Note</i>	<i>2020</i>	<i>10%</i>	<i>n/a</i>	<i>On dmd</i>				X	E	X	A	M	P	L	E
1	(J) Members Mortgage Co.	Stoneham, MA	Mortgage	2003	5.375	0	30 years			X								
2	(J) Select Portfolio Servicing, Inc. (SPS)	Salt Lake City, UT	Mortgage	2003	5.5	0	20 years		X									
3	(J) Members Mortgage Co.	Stoneham, MA	Mortgage	2021	2.875	0	30 years						X					
4																		
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EXEMPTION TEST (see Financial Disclosure Instructions for CY 2023): If you omitted any asset because it meets the three-part test for exemption described in the instructions, please check box to the right. This category applies only if the asset is/was held independently by the spouse or dependent child. If the asset is/was either held by the filer or jointly held, use the other categories of value, as appropriate.

