



Return to the search tab to select another report.

Annual Report for Calendar 2024

The Honorable Elizabeth Warren (Warren, Elizabeth)

📄 Filed 04/18/2025 @ 11:50 AM

 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	Royalties	CCH Inc dba Wolters Kluwer Law & Business (Formerly Aspen Publishers) Riverwoods, IL	\$27,919.90	n/a
2	Self	Retirement	TIAA Administration Services LLC New York, NY	\$88,423.61	n/a
3	Spouse	Salary	Harvard University Cambridge, MA	> \$1,000	n/a
4	Spouse	Retirement	TIAA Administration Services LLC Charlotte, NC	> \$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
1	Capital One (McLean, VA) <i>Type: Savings,</i>	Bank Deposit	Joint	\$50,001 - \$100,000	None,	None (or less than \$201)
2	Bank of America (Charlotte, NC) <i>Type: Checking,</i>	Bank Deposit	Joint	\$1,001 - \$15,000	None,	None (or less than \$201)
3	Bank of America (Charlotte, NC) <i>Type: Savings,</i>	Bank Deposit	Joint	\$1,001 - \$15,000	None,	None (or less than \$201)
4	First National Bank of Omaha (Omaha, NE) <i>Type: Savings,</i>	Bank Deposit	Joint	\$50,001 - \$100,000	Interest,	\$2,501 - \$5,000
5	TIAA-CREF Traditional	Mutual Funds Mutual Fund	Self	\$1,000,001 - \$5,000,000	Excepted Investment Fund,	None (or less than \$201)
6	QCSTIX - CREF Stock Account - R3	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)

7	QCGLIX - CREF Global Equities Account - R3	Asset Mutual Type Funds	Self Owner	\$250,001 - \$500,000 Value	Excepted Income Type Investment	None (or income less than \$201)
		Mutual Fund			Fund,	
8	QREARX - TIAA Real Estate Account	Mutual Funds Mutual Fund	Self	\$500,001 - \$1,000,000	Excepted Investment Fund,	None (or less than \$201)
9	VSMPX - Vanguard Total Stock Market Index Fund Institution	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
10	TIAA-CREF Traditional	Mutual Funds Mutual Fund	Spouse	Over \$1,000,000 and held independently by spouse or dependent child	Excepted Investment Fund,	None (or less than \$201)
11	QCEQIX - CREF Equity Index Account - R3	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
12	VSMPX - Vanguard Total Stock Market Index Fund Institution	Mutual Funds Mutual Fund	Spouse	Over \$1,000,000 and held independently by spouse or dependent child	Excepted Investment Fund,	None (or less than \$201)
13	VFIAX - Vanguard 500 Index Fd Admiral Shs	Mutual Funds Mutual Fund	Joint	\$500,001 - \$1,000,000	Excepted Investment Fund,	\$5,001 - \$15,000

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	Joint	VFIAX	Vanguard 500 Index Fd Admiral Shs	Purchase	02/05/2024	\$15,001 - \$50,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
2	Joint	VFIAX	Vanguard 500 Index Fd Admiral Shs	Purchase	03/11/2024	\$50,001 - \$100,000	n/a
3	Joint	VFIAX	Vanguard 500 Index Fd Admiral Shs	Purchase	03/22/2024	\$1,001 - \$15,000	n/a
4	Joint	VFIAX	Vanguard 500 Index Fd Admiral Shs	Purchase	03/25/2024	\$50,001 - \$100,000	n/a
5	Joint	VFIAX	Vanguard 500 Index Fd Admiral Shs	Purchase	04/17/2024	\$15,001 - \$50,000	n/a
6	Joint	VFIAX	Vanguard 500 Index Fd Admiral Shs	Purchase	06/28/2024	\$1,001 - \$15,000	n/a
7	Joint	VFIAX	Vanguard 500 Index Fd Admiral Shs	Purchase	07/16/2024	\$15,001 - \$50,000	n/a
8	Joint	VFIAX	Vanguard 500 Index Fd Admiral Shs	Purchase	08/02/2024	\$15,001 - \$50,000	n/a
9	Joint	VFIAX	Vanguard 500 Index Fd Admiral Shs	Purchase	09/27/2024	\$1,001 - \$15,000	n/a
10	Joint	VFIAX	Vanguard 500 Index Fd Admiral Shs	Purchase	10/11/2024	\$15,001 - \$50,000	n/a
11	Joint	VFIAX	Vanguard 500 Index Fd Admiral Shs	Purchase	12/23/2024	\$1,001 - \$15,000	n/a
12	Self	--	QCGLIX - CREF Global Equities Account - R3	Sale (Partial)	03/18/2024	\$1,001 - \$15,000	n/a
13	Self	--	QCGLIX - CREF Global Equities Account - R3	Sale (Partial)	06/17/2024	\$1,001 - \$15,000	n/a
14	Self	--	QREARX - TIAA Real Estate Account	Purchase	04/15/2024	\$1,001 - \$15,000	n/a
15	Self	--	QCGLIX - CREF Global	Sale (Partial)	09/17/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Equities Account - R3 Asset Name	Transaction Type	Transaction Date	Amount	Comments
16	Self	--	TIAA-CREF Traditional	Sale (Partial)	12/26/2024	\$15,001 - \$50,000	n/a
17	Self	--	QCGLIX - CREF Global Equities Account - R3	Sale (Partial)	12/17/2024	\$1,001 - \$15,000	n/a
18	Self	--	QREARX - TIAA Real Estate Account	Sale (Partial)	12/26/2024	\$15,001 - \$50,000	n/a
19	Self	--	TIAA-CREF Traditional	Sale (Partial)	12/26/2024	\$1,001 - \$15,000	n/a
20	Spouse	--	TIAA-CREF Traditional	Sale (Partial)	03/15/2024	\$15,001 - \$50,000	n/a
21	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	02/20/2024	\$1,001 - \$15,000	n/a
22	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	03/20/2024	\$1,001 - \$15,000	n/a
23	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	01/05/2024	\$1,001 - \$15,000	n/a
24	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	02/09/2024	\$1,001 - \$15,000	n/a
25	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	03/08/2024	\$1,001 - \$15,000	n/a
26	Spouse	--	TIAA-CREF Traditional	Sale (Partial)	03/15/2024	\$1,001 - \$15,000	n/a
27	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	04/22/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Stock Asset Name Index Fund	Purchase Transaction Type	Transaction Date	Transaction Amount	Comments
28	Spouse	VSMPX	Vanguard Total Stock Market Index Fund	Purchase	05/21/2024	\$1,001 - \$15,000	n/a
Instituti							
29	Spouse	VSMPX	Vanguard Total Stock Market Index Fund	Purchase	06/20/2024	\$1,001 - \$15,000	n/a
30	Spouse	--	TIAA-CREF Traditional	Sale (Partial)	06/17/2024	\$15,001 - \$50,000	n/a
31	Spouse	VSMPX	Vanguard Total Stock Market Index Fund	Purchase	04/05/2024	\$1,001 - \$15,000	n/a
32	Spouse	VSMPX	Vanguard Total Stock Market Index Fund	Purchase	05/10/2024	\$1,001 - \$15,000	n/a
33	Spouse	VSMPX	Vanguard Total Stock Market Index Fund	Purchase	06/07/2024	\$1,001 - \$15,000	n/a
34	Spouse	VSMPX	Vanguard Total Stock Market Index Fund	Purchase	07/22/2024	\$1,001 - \$15,000	n/a
35	Spouse	VSMPX	Vanguard Total Stock Market Index Fund	Purchase	08/20/2024	\$1,001 - \$15,000	n/a
36	Spouse	VSMPX	Vanguard Total Stock Market Index Fund	Purchase	09/20/2024	\$1,001 - \$15,000	n/a
37	Spouse	VSMPX	Vanguard Total Stock Market Index Fund	Purchase	07/05/2024	\$1,001 - \$15,000	n/a
38	Spouse	VSMPX	Vanguard Total Stock Market Index Fund	Purchase	08/09/2024	\$1,001 - \$15,000	n/a
39	Spouse	VSMPX	Vanguard Total Stock Market	Purchase	09/06/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Index Fund Instituti Asset Name	Transaction Type	Transaction Date	Amount	Comments
40	Spouse	--	TIAA-CREF Traditional	Sale (Partial)	09/16/2024	\$15,001 - \$50,000	n/a
41	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	10/21/2024	\$1,001 - \$15,000	n/a
42	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	11/20/2024	\$1,001 - \$15,000	n/a
43	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	10/04/2024	\$1,001 - \$15,000	n/a
44	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	11/08/2024	\$1,001 - \$15,000	n/a
45	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	12/06/2024	\$1,001 - \$15,000	n/a
46	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	12/27/2024	\$1,001 - \$15,000	n/a
47	Spouse	--	TIAA-CREF Traditional	Sale (Partial)	12/16/2024	\$15,001 - \$50,000	n/a
48	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	10/04/2024	\$1,001 - \$15,000	n/a
49	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	11/08/2024	\$1,001 - \$15,000	n/a
50	Spouse	VSMPX	Vanguard Total Stock Market Index Fund Instituti	Purchase	12/06/2024	\$1,001 - \$15,000	n/a

51	Spouse	VSMPX	Vanguard Total Stock Market Index Fund	Purchase Transaction	12/27/2024	\$1,001 - \$15,000	n/a
#	Owner	Ticker	Asset Name	Type	Date	Amount	Comments
			Instituti				

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? **No**

Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **No**

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 2013	Harvard University Cambridge, MA	Other (Agreement with Harvard Law School to hold honorary title of Emeritus Professor.)	Terms of agreement include continued use of storage space for teaching and research materials.	n/a
2	Dec 1985	Aspen Publishers (now CCH) New York, NY	Royalty Agreement	Royalties for books, "Chapter 11: Reorganizing American Businesses", "Commercial Law Studies", "Bankruptcy and Article 9", "The Law of Debtors and Creditors", "Secured Credit: A Systems Approach", "Commercial Transactions: A	n/a

#	Date	Parties Involved	Type	Commercial Transactions: A Systems Approach." Status and Terms	Comments
3	Mar 2000	Yale University Press New Haven, CT	Royalty Agreement	Royalties for book, "The Fragile Middle Class."	n/a
4	Dec 2013	Henry Holt and Company (division of Macmillan Publishing Group LLC) New York, NY	Royalty Agreement	Advance and royalties based on customary and usual terms for book, "A Fighting Chance."	n/a
5	Apr 2002	Perseus Books Group New York, NY	Royalty Agreement	Royalties for book, "The Two-Income Trap."	n/a
6	May 1999	Beard Books Washington, DC	Royalty Agreement	Royalties for book, "As We Forgive Our Debtors."	n/a
7	Apr 2004	Free Press (now Simon & Schuster) New York, NY	Royalty Agreement	Royalties for book, "All Your Worth."	n/a
8	Nov 2016	Henry Holt and Company (division of Macmillan Publishing Group LLC) New York, NY	Royalty Agreement	Advance and royalties based on customary and usual terms for book, "This Fight is Our Fight."	n/a
9	Nov 2020	Henry Holt and Company (division of Macmillan Publishing Group LLC) New York, NY	Royalty Agreement	Agreement to receive book advance and royalty payments based on customary and usual terms for publication of the book titled, "Persist."	n/a
10	Mar	Macmillan	Royalty	Agreement to receive book	n/a

#	Date	Parties Involved	Agreement Type	Status and Terms	Comments
	2021	Publishing Group, LLC (D/W Henry Holt and Company) New York, NY	Agreement Type	advance and royalty payments based on customary and usual terms for publication of a picture book titled, "Pinkie Promises."	

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.

