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Annual Report for Calendar 2024

The Honorable Jeffrey A Merkley (Merkley, Jeff)

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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	Spouse	Wages	Providence Hospital Portland, OR	> \$1,000	n/a
2	Self	Royalties	William Morris Endeavor Ent. LLC on behalf of The New Press New York, NY	\$1,593.75	n/a
3	Self	Retirement	Fidelity IRA BDA Boston, MA	\$23,820.48	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	Fidelity Retirement	Retirement Plans IRA	Self			
1.1	FXAIX - Fidelity 500 Index Fund	Mutual Funds Mutual Fund	Self	\$500,001 - \$1,000,000	Excepted Investment Fund,	None (or less than \$201)
2	Unitus Community Credit Union (Portland, OR) <i>Type: Checking,</i>	Bank Deposit	Joint	\$1,001 - \$15,000	Interest,	None (or less than \$201)
3	Unitus Community Credit Union (Portland, OR) <i>Type: Savings,</i>	Bank Deposit	Joint	None (or less than \$1,001)	Interest,	None (or less than \$201)
4	Unitus Community Credit Union, (Portland, OR) <i>Type: Savings,</i>	Bank Deposit	Joint	\$1,001 - \$15,000	Interest,	None (or less than \$201)
5	Providence Retirement	Retirement Plans IRA	Spouse			
5.1	FGKFX - Fidelity Growth Company K6 Fund	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)
5.2	Providence Core Retirement Plan	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
5.3	Providence 401k	Retirement Plans Defined Contribution Pension Plan	Spouse			
5.3.1	Large Cap Fidelity Growth Company Pool CL3	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
6	Rental House <i>Description: Rental House</i> (Washington, DC)	Real Estate Residential	Joint	\$1,000,001 - \$5,000,000	Rent/Royalties,	\$15,001 - \$50,000
7	Rental House <i>Description: Rental House</i>	Real Estate Residential	Joint	\$250,001 - \$500,000	Rent/Royalties,	\$15,001 - \$50,000

(Portland, OR) Asset	Asset Type	Owner	Value	Income Type	Income
8 Rental House <i>Description:</i> Rental House (Portland, OR)	Real Estate Residential	Joint	\$500,001 - \$1,000,000	Rent/Royalties,	\$15,001 - \$50,000
9 Undeveloped Lot <i>Description:</i> Undeveloped Lot (Portland, OR)	Real Estate Unimproved Land	Joint	\$250,001 - \$500,000	None,	None (or less than \$201)
10 Rental House (Washington DC #2) <i>Description:</i> Kentucky Ave (Washington, DC)	Real Estate Residential	Joint	\$1,000,001 - \$5,000,000	Rent/Royalties,	\$15,001 - \$50,000
11 Fidelity Retirement	Retirement Plans IRA	Spouse			
11.1 FDRXX-Fidelity Cash Reserves	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
11.2 FDSVX - Fidelity Growth Discovery Fund	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
11.3 FDGRX - Fidelity Growth Company	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
11.4 FBGRX - Fidelity Blue Chip Growth Fund	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
12 Public Employee Retirement - Individual Account	Retirement Plans Defined Benefit Pension Plan	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
13 Public Employee Retirement - Regular Account	Retirement Plans Defined Benefit Pension Plan	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
14 Portland Rental House <i>Description:</i> Rental House (Portland, OR)	Real Estate Residential	Joint	\$250,001 - \$500,000	Rent/Royalties,	\$15,001 - \$50,000
15 Solar Renewable Energy Credits <i>Description:</i> Sales of solar renewable energy credits	Personal Property Other	Joint	\$1,001 - \$15,000	Other, (Sales of solar renewable energy credits.)	Other \$2,701.35
16 SoFi (San Francisco, CA) <i>Type:</i> Savings,	Bank Deposit	Joint	\$100,001 - \$250,000	Interest,	\$5,001 - \$15,000
17 Fidelity IRA RRA	Retirement Plans	Joint			

17	Fidelity IRA BDA Asset	Retirement Plans Asset Type	Joint Owner	Value	Income Type	Income
17.1	SPAXX -- Fidelity Government Money Market	Mutual Funds Mutual Fund	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
17.2	FXAIX - Fidelity 500 Index Fund	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
18	Fidelity Brokerage Account	Brokerage/Managed Account	Joint			
18.1	FXAIX - Fidelity 500 Index Fund	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Excepted Investment Fund,	\$1,001 - \$2,500
18.2	FGRIX - Fidelity Growth and Income Pt	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$2,501 - \$5,000
18.3	FBGRX - Fidelity Blue Chip Growth Fund	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$2,501 - \$5,000
18.4	FDVLX - Fidelity Value Fund	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$2,501 - \$5,000
18.5	JAGIX - Janus Henderson Growth and Income Fund - T Share	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$2,501 - \$5,000
18.6	VPMCX - Vanguard Primecap Fund	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$2,501 - \$5,000
18.7	VFIAX - Vanguard 500 Index Fd Admiral Shs	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$201 - \$1,000
18.8	SPAXX -- Fidelity Government Money Market	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$1,001 - \$2,500
19	Bread Financial (Columbus, OH) Type: Certificate of Deposit,	Bank Deposit	Joint	\$100,001 - \$250,000	None,	None (or less than \$201)

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	FCNTX	Fidelity Contra Fund	Sale (Full)	09/24/2024	\$100,001 - \$250,000	n/a
2	Joint	FLPSX	Fidelity Low-Priced Stock Fund	Sale (Full)	09/24/2024	\$15,001 - \$50,000	n/a
3	Joint	VPMCX	Vanguard Primecap Fund	Sale (Full)	09/24/2024	\$1,001 - \$15,000	n/a
4	Joint	FXAIX	Fidelity 500 Index Fund	Purchase	09/24/2024	\$100,001 - \$250,000	n/a
5	Joint	FXAIX	Fidelity 500 Index Fund	Purchase	09/24/2024	\$15,001 - \$50,000	n/a

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	2014	Joint	Mortgage	0	3.75% (30)	\$250,001 - \$500,000	Wells Fargo Minneapolis, MN	n/a
2	2021	Joint	Home Equity Line of Credit	-	7.99% (on demand)	\$15,001 - \$50,000	Unitus Community Credit Union Portland, OR	n/a
3	2022	Joint	Mortgage	4.523	2.75% (15 years)	\$100,001 - \$250,000	Unitus Community Credit Union Portland, OR	n/a

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 1999	Oregon Public Employees Retirement System Tigard, OR	Continuing participation in an employee benefit plan	Shall receive payments from regular account at age 70 1/2 or older.	n/a
2	Jan 1999	Oregon Public Employees Retirement System Tigard, OR	Continuing participation in an employee benefit plan	Shall receive payments from individual account program at age 70 1/2 or older.	n/a
3	Apr 2022	The New Press, Inc. New York, NY	Royalty Agreement	The contract provides for delivering a manuscript of 70,000 words by November 28, 2022. The contract provides for an advance of \$7500, payable in two installments. Royalty payments are 10-15% of the retail price for hardcover books sold. Royalty payments are 7.5% of the retail price for paperback books sold.	n/a
4	Feb 2019	Hachette Book Group, Inc. New York, NY	Royalty Agreement	The contract provides for delivering a manuscript of 30,000 to 35,000 words by April 1, 2019. The contract provides for an advance of \$150,000, payable in three installments. Royalty payments are 10-15% of the retail price for hardcover books. For paperback copies, royalty payments are: 7.5% for trade copies, 8-10% for mass market copies.	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.

Comments

Former asset FCNTX was donated in full to charity.

