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Rep. Sara Jacobs (D-CA)

Served: House 2021–present Currently in office

House · Democrat (most recent term) · CA-51 · in Congress 2021–present · Bioguide ID J000305

Data current through 2026-10-19 (latest filing date seen in the official sources: 2026-10-16) · report last updated 2026-10-19. A report is rebuilt only when new or changed source data affects it; the site-wide source check date is on the Methodology page.

Party history: D 2021–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 before entering office (report year 2021, the member's first year in office)	2021	$25,001,042	**$76,034,020**	$127,066,999
(b) Latest net worth estimate	2025	$23,203,016	**$81,724,507**	$140,245,998
(c) Estimated gain / loss, nominal dollars, 2021 → 2025 (4 years spanned)	2021–2025	− $103,863,983	+ **$5,690,486**	+ $115,244,956

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.**

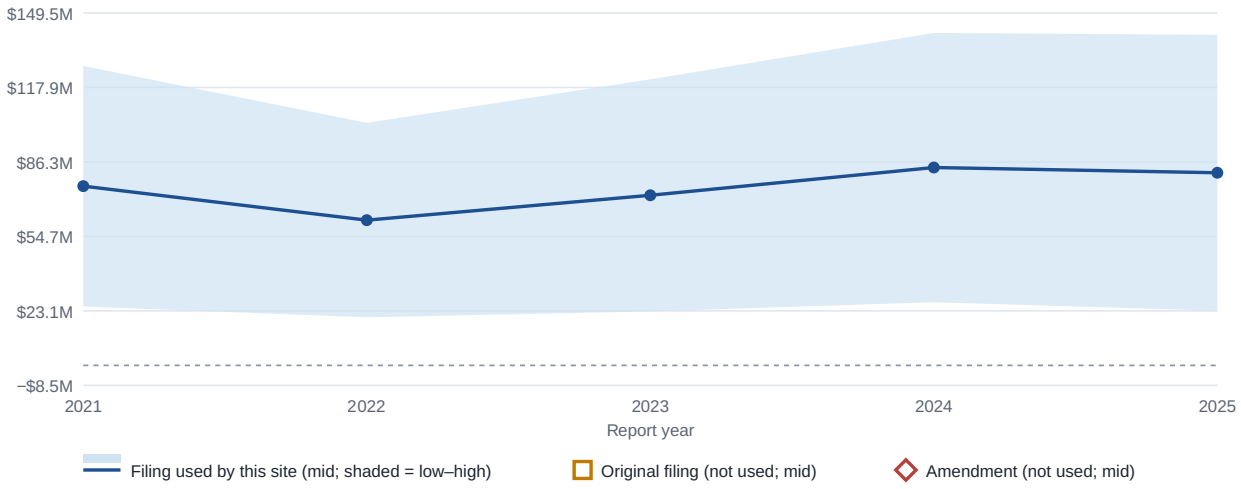
Net worth by report year (mid; Low–High)

Report year	Assets (mid)	Liabilities (mid)	Net worth mid	Low ... High	Status / flags
2021	$76,784,021	$750,000	**$76,034,020**	$25,001,042 ... $127,066,999	computed
2022	$62,394,522	$750,000	**$61,644,522**	$20,410,044 ... $102,878,999	computed; 1 Schedule A row(s) had the upper bound of the range lost in text extraction; completed from the fixed statutory bracket
2023	$73,664,522	$1,500,001	**$72,164,521**	$22,933,044 ... $121,395,998	computed

2024	$85,428,021	$1,500,001	**$83,928,020**	$26,805,042 … $141,050,998	computed
2025	$85,099,508	$3,375,001	**$81,724,507**	$23,203,016 … $140,245,998	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.

Net worth by filing (every annual report and amendment)



Report year	DocID	Filed	Type	Net worth low … high (mid)	Used by this site	Note
2021	10048224	7/21/2022	Original	$25,001,042 … $127,066,999 ($76,034,020)	yes	
2022	10052695	6/14/2023	Original	$20,410,044 … $102,878,999 ($61,644,522)	yes	
2023	10059210	8/13/2024	Original	$22,933,044 … $121,395,998 ($72,164,521)	yes	

2024	10066924	8/13/2025	Original	$26,805,042 … $141,050,998 ($83,928,020)	yes
2025	10074394	6/26/2026	Original	$23,203,016 … $140,245,998 ($81,724,507)	yes

Every annual report and amendment on record for this member is listed. Net worth is computed for each filing with the same rules as above. For each report year the site uses one filing (the most recently filed one whose Schedule A is at least 40% as long as the longest filing for that year; electronic filings take precedence over scanned ones); the others are shown for comparison only and do not affect any figure or ranking. Scanned (image-only) filings are listed but not computed. Senate paper reports are not listed.

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.)
+4.4%

SIMPLE AVERAGE OF YEARS
+5.9%

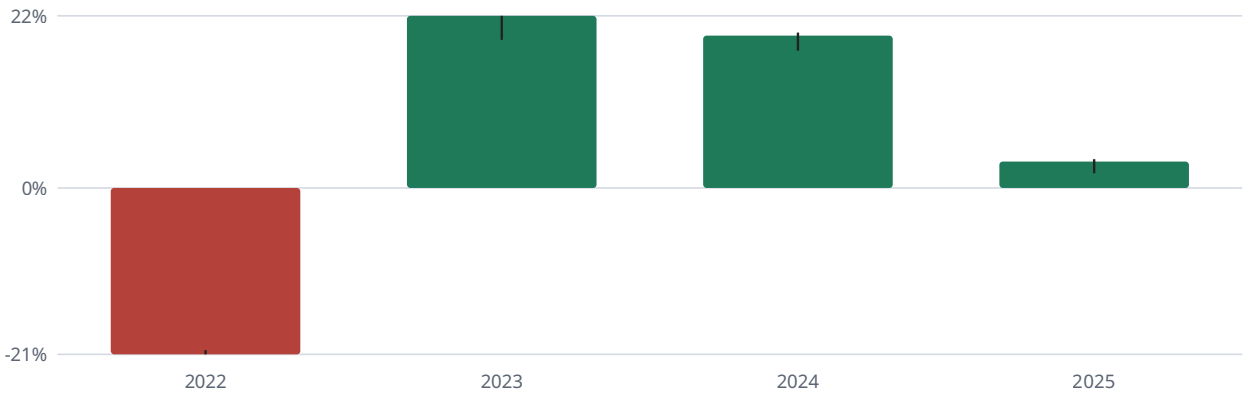
YEARS ESTIMATED
4

BEST / WORST SINGLE YEAR
2023 +22%
2022 -21%

Reliability flags: few years (4); 1 unparsed value(s).

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +3.1% to +4.6%. 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	St fla
2021→2022	$76,552,018	$62,098,018	$1,259,258	$3,121,504	$97,003	-21.2%	-21.3% … -20.7%	-145% … +102%	100%	co ma ne ex po
2022→2023	$61,992,014	$73,259,014	$2,380,809	$113,502	$56,502	+21.9%	+18.9% … +22.6%	-125% … +169%	100%	co
2023→2024	$73,664,522	$85,353,020	$2,349,311	$250,010	$507,022	+19.4%	+17.5% … +19.8%	-127% … +166%	100%	co
2024→2025	$85,428,021	$85,091,508	$2,817,006	$0	$387,015	+3.4%	+1.9% … +3.7%	-132% … +139%	100%	co

Filings used

Each annual-report year uses one filing (most recently filed version among originals/amendments whose Schedule A row count is ≥ 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
2021	10048224	House annual	7/21/2022	117	0	10048224.pdf e272638400811e4a65fa5fd97be9d9b740d8077a49f625cb26f24397174967d3
2022	10052695	House annual	6/14/2023	45	1	10052695.pdf b4b9443ebe3e7a525d306bccabd0a9c06b9fe9eeec7b75d6626f5e48dca08229
2023	10059210	House annual	8/13/2024	56	0	10059210.pdf ee2b276fb69d51f1ccb112b8abfc19290344def10d7dbf8dfae0af47b438814c

2024	10066924	House annual	8/13/2025	52	0	10066924.pdf 1bdf953f932b989375eea6182d09c6a414283119da24b7209546075885378127
2025	10074394	House annual	6/26/2026	43	0	10074394.pdf f40548c39b89388972c766e2e1ee418dc53db6a96c3cdf5e796394f6a46173b2

Largest movers 2022→2023

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ QCOM ⇒ Belgard Capital Fund LLC	—	held	$1,000,001 - $5,000,000	$5,000,001 - $25,000,000	$0	$0
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ QCOM ⇒ U.S. Treasury Bills [GS]	—	held	$1,000,001 - $5,000,000	None	$0	$0
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ QCOM ⇒ QUALCOMM Incorporated (QCOM) [ST]	—	held	$500,001 - $1,000,000	$1,000,001 - $5,000,000	$0	$0
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ Main ⇒ Bank of America, N.A. [BA	—	held	$100,001 - $250,000	$50,001 - $100,000	$0	$0
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ QCOM ⇒ Bank of America, N.A. [BA	—	held	$1 - $1,000	$50,001 - $100,000	$0	$0
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Vanguard Total Stock Market ETF (VTI) [	—	held	$15,001 - $50,000	$50,001 - $100,000	$0	$0
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ iShares Core Dividend Growth ETF (DGRO)	—	held	$15,001 - $50,000	$1,001 - $15,000	$0	$0
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ WisdomTree Floating Rate Treasury Fund	—	held	$15,001 - $50,000	$1,001 - $15,000	$0	$8,000

Largest movers 2023→2024

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Sara Jacobs Trust U/A DTD 09/01/2009 ⇒ Merrill Lynch - SJ QCOM ⇒ Clearfork Capital Fund LL	—	held	$1,000,001 - $5,000,000	$5,000,001 - $25,000,000	$0	$0
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ First Trust TCW Opportunistic Fixed Inc	—	held	$15,001 - $50,000	None	$0	$0
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Shenkman Capital Short Duration High In	—	held	$15,001 - $50,000	None	$8,000	$8,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Artisan High Income Fund Advisor Shares	—	held	$15,001 - $50,000	$1,001 - $15,000	$8,000	$8,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ DWS RREEF Real Assets Fund - Class Inst	—	held	$15,001 - $50,000	$1,001 - $15,000	$0	$8,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ ALPS/Smith Total Return Bond Fund Class	—	held	$15,001 - $50,000	$15,001 - $50,000	$16,001	$32,500
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Vanguard Div Appreciation ETF (VIG) [EF	—	held	$15,001 - $50,000	$1,001 - $15,000	$0	$8,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Washington Mutual Investors Fund Cl F-2	—	held	$15,001 - $50,000	$15,001 - $50,000	$0	$16,001

Largest movers 2024→2025

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Trust #1 ⇒ Bank of America - Checking Account [BA]	—	held	$50,001 - $100,000	$100,001 - $250,000	$0	$0
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Eaton Vance Richard Bernstein Equity St	—	held	$15,001 - $50,000	None	$0	$0
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Washington Mutual Investors Fund Cl F-2	—	held	$15,001 - $50,000	None	$0	$8,000

Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ AMCAP Fund, Class F-2 Shares (AMCFX) [M	—	held	$15,001 - $50,000	None	$0	$8,000
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Capital Group Growth ETF Capital Group	—	held	$1,001 - $15,000	None	$0	$0
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Bank of America, N.A. [BA]	—	held	$1,001 - $15,000	None	$0	$0
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Vanguard Total Stock Market ETF (VTI) [	—	held	$15,001 - $50,000	None	$0	$40,501
Sara J Jacobs 1999 Trust ⇒ Merrill Lynch - SJ BP ⇒ Kopernik Global All-Cap Fund-Instituti	—	held	$1,001 - $15,000	None	$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.