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Sen. Mitt Romney (R-UT)

Served: Senate 2019–2025 Former member – left office 2025

Senate · Republican (most recent term) · UT · in Congress 2019–2025 · Bioguide ID R000615

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: R 2019–2025. 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 2018)	2018	$57,325,112	**$157,210,054**	$257,094,996
(b) Latest net worth estimate	2023	$63,612,083	**$192,201,040**	$320,789,998
(c) Estimated gain / loss, nominal dollars, 2018 → 2023 (5 years spanned)	2018–2023	– $193,482,913	+ **$34,990,986**	+ $263,464,886

Gain Low = latest Low – earliest High; Gain High = latest High – earliest Low (widest possible spread); Mid = latest Mid – earliest Mid.

Reliability flags (net worth): 2018: 1 open-ended liability value(s) counted at the lower bound (understates liabilities); 2023: 6 open-ended liability value(s) counted at the lower bound (understates liabilities); 2018: open-ended liability value(s) counted at lower bound; 2023: open-ended liability value(s) counted at lower bound. **Not in the recommended dollar-gain ranking** (shown only in the full list).

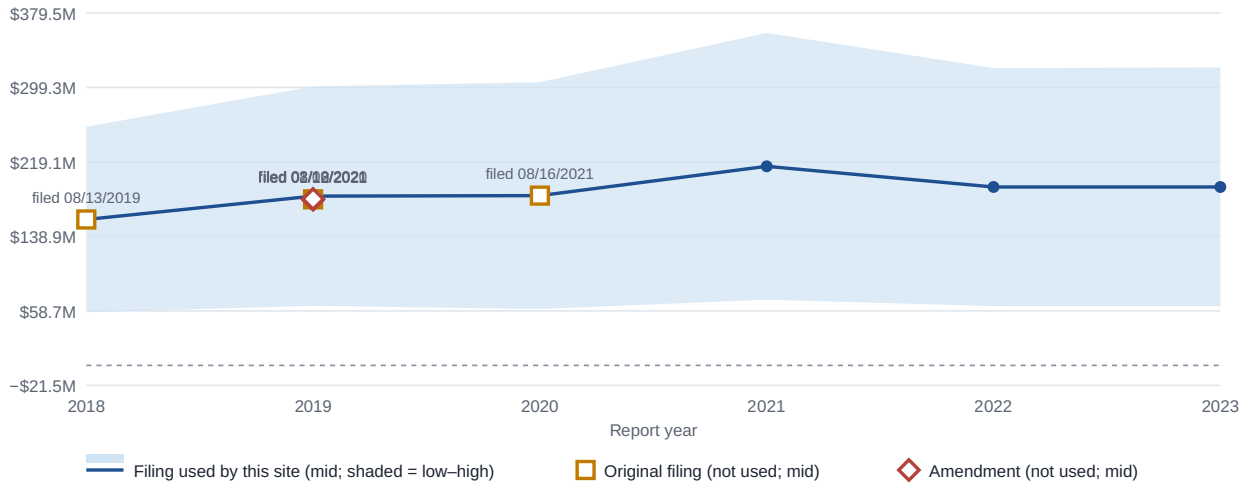
Net worth by report year (mid; Low–High)

Report year	Assets (mid)	Liabilities (mid)	Net worth mid	Low ... High	Status / flags
2018	$159,200,056	$1,990,002	**$157,210,054**	$57,325,112 ... $257,094,996	computed; 1 open-ended liability value(s) counted at the lower bound (understates liabilities)
2019	$184,225,050	$1,990,002	**$182,235,048**	$64,100,099 ... $300,369,996	computed; 1 open-ended liability value(s) counted at the lower bound (understates liabilities)

2020	$187,622,042	$4,782,501	**$182,839,542**	$60,734,085 … $304,944,998	computed; 4 open-ended liability value(s) counted at the lower bound (understates liabilities)
2021	$219,186,044	$4,782,501	**$214,403,542**	$70,767,087 … $358,039,998	computed; 4 open-ended liability value(s) counted at the lower bound (understates liabilities)
2022	$196,838,546	$4,782,501	**$192,056,045**	$63,847,092 … $320,264,998	computed; 4 open-ended liability value(s) counted at the lower bound (understates liabilities)
2023	$198,608,542	$6,407,501	**$192,201,040**	$63,612,083 … $320,789,998	computed; 6 open-ended liability value(s) counted at the lower bound (understates liabilities)

- **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
2018	12e3fba2…	08/13/2019	Original	$57,339,112 … $257,129,996 ($157,234,554)	no	
2018	4ea29bf8…	12/20/2019	Amendment	$57,325,112 … $257,094,996 ($157,210,054)	yes	
2019	5fadb332…	08/12/2020	Original	$62,879,098 … $294,954,996 ($178,917,047)	no	
2019	d2c9e50a…	01/12/2021	Amendment	$62,750,096 … $294,619,996 ($178,685,046)	no	
2019	a9fb93d9…	02/08/2021	Amendment	$62,865,098 … $294,919,996 ($178,892,547)	no	
2019	6ba23276…	03/10/2021	Amendment	$63,100,098 … $295,369,996 ($179,235,047)	no	
2019	8f7c6783…	08/25/2021	Amendment	$64,100,099 … $300,369,996 ($182,235,048)	yes	
2020	580c4c34…	08/16/2021	Original	$60,734,085 … $304,944,998 ($182,839,542)	no	
2020	c6b01970…	12/06/2021	Amendment	$60,734,085 … $304,944,998 ($182,839,542)	yes	
2021	77ca7e6e…	08/15/2022	Original	$70,767,087 … $358,039,998 ($214,403,542)	yes	
2022	c4b015cd…	08/10/2023	Original	$63,847,092 … $320,264,998 ($192,056,045)	yes	
2023	fe4735ee…	08/12/2024	Original	$63,612,083 … $320,789,998 ($192,201,040)	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.

YEARS ESTIMATED

AVG. ANNUAL CHANGE (GEOMETRIC, EST.)
+8.4%

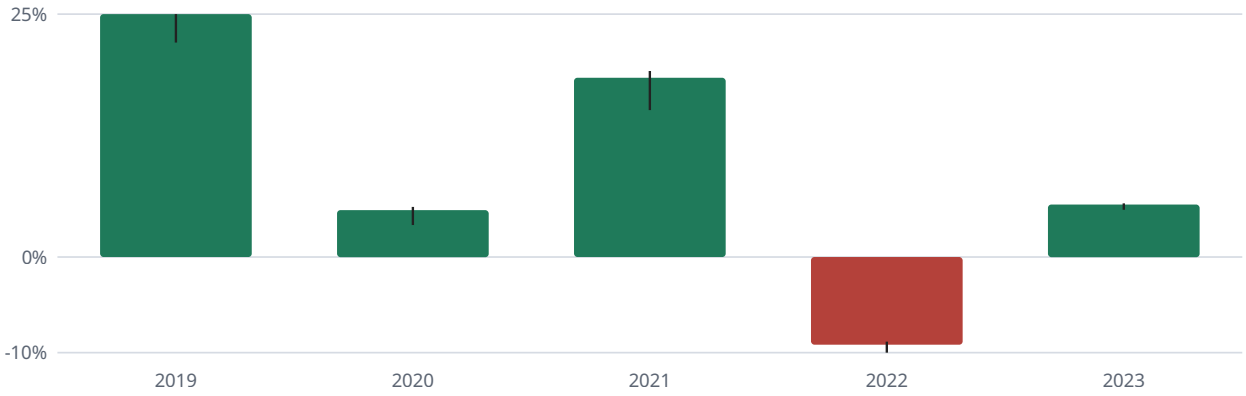
SIMPLE AVERAGE OF YEARS
+9.1%

5

BEST / WORST SINGLE YEAR
2019 +25%
2022 -9%

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +6.5% to +8.8%. 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	Status / flags
2018→2019	$146,855,544	$179,771,044	$4,426,574	$0	$0	+25.4%	+22.5% … +26.1%	-119% … +170%	92%	counted
2019→2020	$172,153,034	$178,870,534	$1,753,564	$0	$0	+4.9%	+3.4% … +5.3%	-128% … +138%	93%	counted
2020→2021	$186,627,530	$213,909,030	$7,730,570	$0	$0	+18.8%	+15.4% … +19.5%	-125% … +162%	99%	counted
2021→2022	$214,546,539	$186,225,039	$8,625,426	$0	$0	-9.2%	-10.8% … -8.8%	-135% … +117%	98%	counted
2022→2023	$195,642,040	$197,751,538	$8,655,928	$0	$0	+5.5%	+4.9% … +5.6%	-129% … +140%	99%	counted

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
2018	4ea29bf8-b00c-454a-ba63-c00ccbf7987d	Senate amendment	12/20/2019	112	0	Senate eFD report `1b8e43a69017d99042e9d612216d911e403a064d90d1e43520fcb5f63cac9149`
2019	8f7c6783-10b1-43e8-8130-0f00683bbc5e	Senate amendment	08/25/2021	99	0	Senate eFD report `9c3056196890c003aabc5155fc2b7496258d311ee2cffb8a7fe3c5ae264e04b8`

2020	c6b01970-5a05-4cb2-9cc6-b0796936fe30	Senate amendment	12/06/2021	85	0	Senate eFD report 6c4c600b80d0e2232507d3b52191189fa71e16f4bf0c6c5c6d110f4dcce921e6
2021	77ca7e6e-f762-429a-bb78-32a6b6278342	Senate annual	08/15/2022	87	0	Senate eFD report 8dcfe8eb97a3d3c4fd07531f5a4c93234fe9fd0dda0bc09f344234662a797095
2022	c4b015cd-ff0a-49ff-8abc-0adc268faddd	Senate annual	08/10/2023	92	0	Senate eFD report defb0204b2c28855d42ee91e5055e75c3531d19182bf7621cd409caff91d34e0

2023	fe4735ee-8675-4ef8-9408-6c87340f1d81	Senate annual	08/12/2024	83	0	Senate eFD report 93618b8da0d7d17bb840b95f63ccd16fc6f24f5dfb9b98a5872f781000e8cb87

Largest movers 2020→2021

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
The W. Mitt Romney 1998 Revocable Trust ⇒ IWF - iShares Russell 1000 Growth ETF	—	held	$1,000,001 - $5,000,000	$5,000,001 - $25,000,000	$0	$0
The W. Mitt Romney 1998 Revocable Trust ⇒ SPY - SPDR S&P 500 ETF	—	held	$1,000,001 - $5,000,000	$5,000,001 - $25,000,000	$0	$0
Goldman Sachs IRA #2 ⇒ Goldman Sachs Bank Deposit (Boston, MA) Type: Brokerage Sweep Accou	—	held	$1,000,001 - $5,000,000	$100,001 - $250,000	$0	$0
The W. Mitt Romney 1998 Revocable Trust ⇒ HEDJ - WisdomTree Europe Hedged Equity Fund	—	held	$500,001 - $1,000,000	$1,000,001 - $5,000,000	$0	$0
The W. Mitt Romney 1998 Revocable Trust ⇒ GGLPX - Goldman Sachs High Yield Municipal Fund	—	held	$500,001 - $1,000,000	$1,000,001 - $5,000,000	$0	$0
The W. Mitt Romney 1998 Revocable Trust ⇒ IWM - iShares Russell 2000 ETF	—	held	$500,001 - $1,000,000	$1,000,001 - $5,000,000	$0	$0
Vantage 2 LLC Company: Vantage 2 LLC (Moorpark, CA) Description: Horses/ Horse Breeding	SP	held	$250,001 - $500,000	$100,001 - $250,000	$0	$0
Rob Rom LLC Company: Rob Rom LLC (Moorpark, CA) Description: Horses/ Horse Breeding	SP	held	$100,001 - $250,000	$15,001 - $50,000	$0	$0

Largest movers 2021→2022

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
The W. Mitt Romney 1998 Revocable Trust ⇒ IWF - iShares Russell 1000 Growth ETF	—	held	$5,000,001 - $25,000,000	$1,000,001 - $5,000,000	$0	$0
The W. Mitt Romney 1998 Revocable Trust ⇒ SPY - SPDR S&P 500 ETF	—	held	$5,000,001 - $25,000,000	$1,000,001 - $5,000,000	$0	$0
The W. Mitt Romney 1998 Revocable Trust ⇒ GCEPX - Goldman Sachs Clean Energy Income Fund C	—	held	$1,000,001 - $5,000,000	$250,001 - $500,000	$0	$0
The W. Mitt Romney 1998 Revocable Trust ⇒ Goldman Sachs Bank Deposit (Boston, MA) Type: Br	—	held	$1,001 - $15,000; $250,001 - $500,000	$1,000,001 - $5,000,000; $1,001 - $15,000	$0	$0
The W. Mitt Romney 1998 Revocable Trust ⇒ IWM - iShares Russell 2000 ETF	—	held	$1,000,001 - $5,000,000	$500,001 - $1,000,000	$0	$0
Bank of America (Tampa, FL) Type: Checking, Money Market Account, Savings	JT	held	$500,001 - $1,000,000	$100,001 - $250,000	$0	$0
The Ann D. Romney 1998 Revocable Trust ⇒ GCEPX - Goldman Sachs Clean Energy Income Fund CI	SP	held	$500,001 - $1,000,000	$100,001 - $250,000	$0	$0
The Ann D. Romney 1998 Revocable Trust ⇒ GGLPX - Goldman Sachs High Yield Municipal Fund C	SP	held	$500,001 - $1,000,000	$250,001 - $500,000	$0	$0

Largest movers 2022→2023

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
The W. Mitt Romney 1998 Revocable Trust ⇒ SPY - SPDR S&P 500 ETF	—	held	$1,000,001 - $5,000,000	$5,000,001 - $25,000,000	$0	$0
The W. Mitt Romney 1998 Revocable Trust ⇒ Goldman Sachs Bank Deposit (Boston, MA) Type: Br	—	held	$1,000,001 - $5,000,000; $1,001 - $15,000	$50,001 - $100,000	$0	$0

The W. Mitt Romney 1998 Revocable Trust ⇒ GSWPX - Goldman Sachs Small/Mid Cap Growth Fund	—	held	$1,000,001 - $5,000,000	$500,001 - $1,000,000	$0	$0
The W. Mitt Romney 1998 Revocable Trust ⇒ GAHPX - Goldman Sachs Emerging Markets Equity Fu	—	held	$1,000,001 - $5,000,000	$500,001 - $1,000,000	$0	$0
Bain IRA ⇒ BCIP Trust Associates III Description : Private Equity (Boston, MA)	—	held	$1,000,001 - $5,000,000	$500,001 - $1,000,000	$0	$0
Bank of America (Tampa, FL) Type: Checking, Money Market Account, Savings	JT	held	$100,001 - $250,000	$500,001 - $1,000,000	$0	$0
The Ann D. Romney 1998 Revocable Trust ⇒ GGNPX - Goldman Sachs High Yield Floating Rate Fu	SP	held	$500,001 - $1,000,000	$250,001 - $500,000	$0	$0
The Ann D. Romney 1998 Revocable Trust ⇒ GAHPX - Goldman Sachs Emerging Markets Equity Fun	SP	held	$500,001 - $1,000,000	$250,001 - $500,000	$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.