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Sen. Brian Schatz (D-HI)

Served: Senate 2012–present Currently in office

Senate · Democrat (most recent term) · HI · in Congress 2012–present · Bioguide ID S001194

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 2012–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 at the earliest available report (2013); the member entered office earlier, in 2012	2013	−$1,984,983	**−$1,257,494**	−$530,004
(b) Latest net worth estimate	2025	−$137,980	**$3,183,508**	$6,504,995
(c) Estimated gain / loss, nominal dollars, 2013 → 2025 (12 years spanned)	2013–2025	+$392,024	**+$4,441,001**	+$8,489,978

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.**

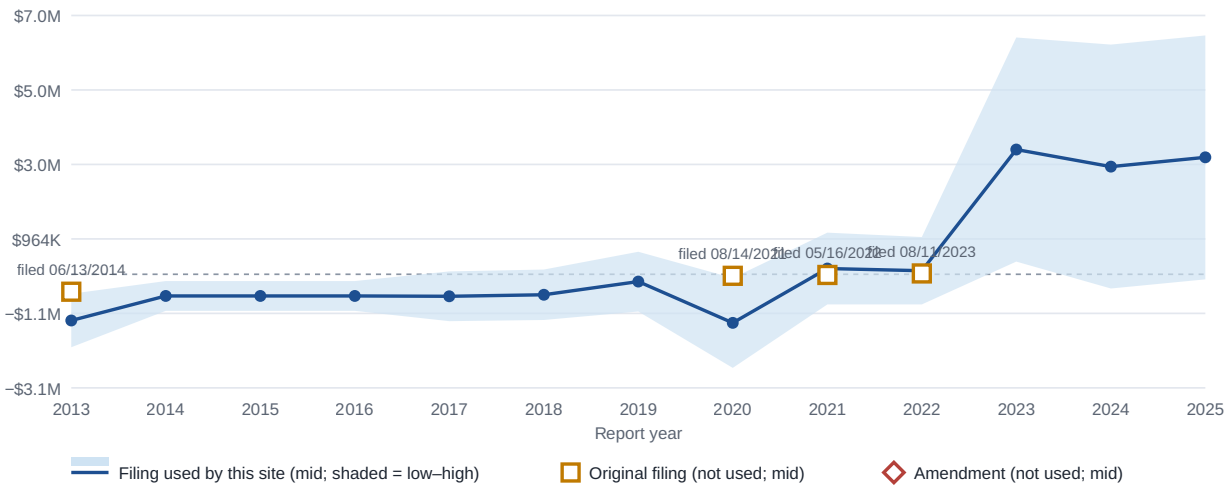
Net worth by report year (mid; Low–High)

Report year	Assets (mid)	Liabilities (mid)	Net worth mid	Low … High	Status / flags
2013	$307,508	$1,565,002	**−$1,257,494**	−$1,984,983 … −$530,004	computed
2014	$193,508	$782,501	**−$588,994**	−$992,985 … −$185,002	computed
2015	$193,508	$782,501	**−$588,994**	−$992,985 … −$185,002	computed
2016	$193,508	$782,501	**−$588,994**	−$992,985 … −$185,002	computed

2017	$601,008	$1,200,002	**−$598,993**	−$1,277,983 … $79,997	computed
2018	$643,508	$1,200,002	**−$556,493**	−$1,242,983 … $129,997	computed
2019	$958,510	$1,157,502	**−$198,991**	−$1,012,979 … $614,997	computed
2020	$958,011	$2,282,502	**−$1,324,492**	−$2,548,978 … −$100,005	computed
2021	$1,282,012	$1,125,001	**$157,010**	−$820,977 … $1,134,998	computed
2022	$1,223,012	$1,125,001	**$98,011**	−$818,976 … $1,014,998	computed
2023	$4,522,513	$1,125,001	**$3,397,512**	$345,026 … $6,449,998	computed
2024	$4,808,510	$1,875,002	**$2,933,508**	−$387,979 … $6,254,996	computed
2025	$4,933,510	$1,750,002	**$3,183,508**	−$137,980 … $6,504,995	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
2013	e327a13a…	06/13/2014	Original	−$934,983 … −$15,002 (−$474,992)	no	
2013	edc851b8…	08/14/2015	Amendment	−$1,984,983 … −$530,004 (−$1,257,494)	yes	
2014	f3b604ee…	08/13/2015	Original	−$992,985 … −$185,002 (−$588,994)	yes	
2015	2a9bcaf7…	08/11/2016	Original	−$992,985 … −$185,002 (−$588,994)	yes	
2016	5963ff5d…	08/11/2017	Original	−$992,985 … −$185,002 (−$588,994)	yes	
2017	490db61b…	08/13/2018	Original	−$1,277,983 … $79,997 (−$598,993)	yes	
2018	54d9a0d4…	07/22/2019	Original	−$1,242,983 … $129,997 (−$556,493)	yes	
2019	2ec99e0f…	08/11/2020	Original	−$1,012,979 … $614,997 (−$198,991)	yes	
2020	1ff046fb…	08/14/2021	Original	−$898,979 … $814,998 (−$41,990)	no	
2020	ab376804…	01/20/2022	Amendment	−$2,548,978 … −$100,005 (−$1,324,492)	yes	
2021	37efccd2…	05/16/2022	Original	−$920,978 … $884,998 (−$17,990)	no	
2021	3d2cb46f…	07/31/2024	Amendment	−$820,977 … $1,134,998 ($157,010)	yes	

2022	e05c1702…	08/11/2023	Original	−$868,977 … $914,998 ($23,010)	no
2022	00f71836…	07/31/2024	Amendment	−$818,976 … $1,014,998 ($98,011)	yes
2023	c0bab3b6…	07/31/2024	Original	$345,026 … $6,449,998 ($3,397,512)	yes
2024	3940df10…	08/13/2025	Original	−$387,979 … $6,254,996 ($2,933,508)	yes
2025	4fde18b9…	07/31/2026	Original	−$137,980 … $6,504,995 ($3,183,508)	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.)
-4.1%

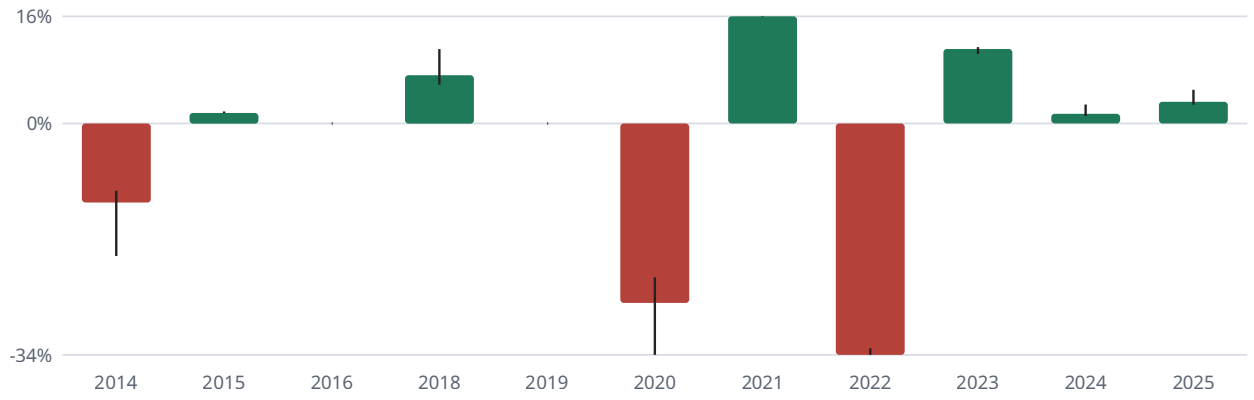
SIMPLE AVERAGE OF YEARS
-2.9%

YEARS ESTIMATED
11

BEST / WORST SINGLE YEAR
2021 +16%
2022 -34%

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): -5.9% to -3.5%. 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
2013→2014	$186,006	$161,506	$3,002	$0	$0	-11.6%	-19.4% … -9.8%	-135% … +112%	60%	counted
2014→2015	$193,508	$193,508	$3,002	$0	$0	+1.6%	+1.5% … +1.8%	-141% … +144%	100%	counted
2015→2016	$193,508	$193,508	$0	$0	$0	+0.0%	+0.0% … +0.0%	-141% … +141%	100%	counted
2016→2017	$80,005	$104,505	$0	$0	$0	+30.6%	+23.3% … +139.9%	-157% … +219%	41%	excluded; not eligible: traced coverage 41% < 60%
2017→2018	$601,008	$643,508	$0	$0	$0	+7.1%	+5.7% … +10.9%	-87% … +101%	100%	counted
2018→2019	$619,507	$619,507	$0	$0	$0	+0.0%	+0.0% … +0.0%	-86% … +86%	96%	counted
2019→2020	$668,507	$493,007	$0	$0	$0	-26.3%	-35.6% … -22.5%	-106% … +54%	70%	counted

2020→2021	$950,010	$1,099,010	$0	$0	$0	+15.7%	+15.6% … +15.7%	-87% … +118%	99%	counted
2021→2022	$1,282,012	$848,012	$0	$0	$0	-33.9%	-36.5% … -32.9%	-113% … +46%	100%	counted
2022→2023	$1,148,012	$1,272,512	$600	$0	$0	+10.9%	+10.2% … +11.2%	-84% … +106%	94%	counted
2023→2024	$3,976,008	$3,967,508	$65,001	$0	$0	+1.4%	+1.1% … +2.8%	-121% … +124%	88%	counted
2024→2025	$3,703,007	$3,703,007	$117,502	$0	$0	+3.2%	+2.8% … +4.9%	-122% … +128%	77%	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
2013	edc851b8-928b-4b52-8459-ab749ff0b92b	Senate amendment	08/14/2015	17	0	Senate eFD report `9c766d5b945f1ba98f490fe9ced46a2e1483c4fb240314f7bb91de409d11bb9c`

2014	f3b604ee-df18-475e-9954-d0e452d52247	Senate annual	08/13/2015	15	0	Senate eFD report 618a79d9bd798e0297fd4c50d2c81c35c6b5f1777ac4f43d9a9e4cd1c536fa74
2015	2a9bcaf7-63d0-4c94-a432-d9802e62c6af	Senate annual	08/11/2016	15	0	Senate eFD report 4f72abcb92ee593c1178d3c2793096c5615d222637037e17d05f8a0d6d75c164
2016	5963ff5d-7570-470c-9037-e5cadb99731a	Senate annual	08/11/2017	15	0	Senate eFD report 2e74d87608bc91eae908529bf20ef5b1fc4434b90854365 16267a5d96ee5c040

2017	490db61b-5705-421b-8b06-1832f4d84190	Senate annual	08/13/2018	17	0	Senate eFD report 82fb2a8d7505078e324b3a1fd91d19779c49d4162c3253e21b4cd75a1023e009
2018	54d9a0d4-f5e1-434b-97ff-53f764a7f0f4	Senate annual	07/22/2019	17	0	Senate eFD report f0c4f6c627671933d63504505f742bf3afd647c3586105e5e50af5931428cd10
2019	2ec99e0f-6383-49f1-bd27-58bb001437c4	Senate annual	08/11/2020	21	0	Senate eFD report 06471579641bddc99c2cbcf64ef497b3d33d8d06fc9fd0b78c73163aada38a60

2020	ab376804-bab1-4750-a69a-aced9fe6a7be	Senate amendment	01/20/2022	22	0	Senate eFD report a65b532a29c706eab1d4b75a25c7545ac0e14b261e8dc99e4b8e448811f39d63
2021	3d2cb46f-6a6c-4f70-85c9-c75c560b8154	Senate amendment	07/31/2024	23	0	Senate eFD report 0a7213f89676064e4912d4b0ac1af781f634d35d099f97ae57d1ae5195301807
2022	00f71836-15dd-46c9-b884-254e5479891e	Senate amendment	07/31/2024	24	0	Senate eFD report 4c79002c2e1d44e2a88ad07e522981c32b0c44182e3382c805f941c31d57f62e

2023	c0bab3b6-4e45-4318-8f17-f06d7efbec4b	Senate annual	07/31/2024	26	0	Senate eFD report f5d6d4fc7e59f55cb388a393877d5c98d2d2f7c9e6e87aee5db1f7acdc9890a1
2024	3940df10-b601-40ba-ad98-539ed8d1ea69	Senate annual	08/13/2025	21	0	Senate eFD report 2448791eaa8e963adcf5f5c6a1ab8be89bd6aab32495faf24607cb68be3a7148
2025	4fde18b9-6e75-4517-87f2-a623802662d2	Senate annual	07/31/2026	20	0	Senate eFD report 9d8dadf40ae8d25ef2e44eb43ca076e793a1dd4c20d8c78da63a0e81a2d0080a

Largest movers 2022→2023

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Pier Wailuku, LLC Company: Pier Wailuku, LLC (Los Alamitos, CA) Description: Holding Compa	SP	held	$50,001 - $100,000	$100,001 - $250,000	$0	$0

TIAA-CREF Research Corp of UH Retirement ⇒ TIQRX - TIAA-CREF Equity Index R (NASDAQ)	—	held	$1,001 - $15,000	$15,001 - $50,000	$0	$0
American Funds 529 Institution: American Funds ⇒ CWMAX - American Funds Washington Mutual	JT	held	$1,001 - $15,000	$1,001 - $15,000	$0	$0
Schatz Collaborative LLC Company: Schatz Collaborative LLC (Honolulu, HI) Description: Com	SP	held	$15,001 - $50,000	$15,001 - $50,000	$0	$0
Brookfield 401(k) ⇒ Fidelity Contrafund Commingled Pool	SP	held	$1,001 - $15,000	$1,001 - $15,000	$0	$0
Residential Property Description: Residential Real Estate (Washington, DC)	JT	held	$250,001 - $500,000	$250,001 - $500,000	$0	$0
Helping Hands Hawaii 403(b) Thrift ⇒ Mutual of America - Calvert VP SRI Balanced Portfolio	—	held	$15,001 - $50,000	$15,001 - $50,000	$0	$0
TIAA-CREF Research Corp of UH Retirement ⇒ TRRSX - TIAA-CREF Real Estate Sec Retire (NASDA	—	held	$1,001 - $15,000	$1,001 - $15,000	$0	$0

Largest movers 2023→2024

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Pier Wailuku, LLC Company: Pier Wailuku, LLC (Los Alamitos, CA) Description: Holding Compa	SP	held	$100,001 - $250,000	$50,001 - $100,000	$0	$0
Helping Hands Hawaii 403(b) Thrift ⇒ Mutual of America - Fidelity Investments VIP Contrafu	—	held	$15,001 - $50,000	$50,001 - $100,000	$0	$0
TIAA-CREF Research Corp of UH Retirement ⇒ TRSCX - TIAA-CREF Social Choice Eq Retire (NASD	—	held	$1,001 - $15,000	$15,001 - $50,000	$0	$0
TIAA-CREF Research Corp of UH Retirement ⇒ QCSTPX - CREF Stock R2	—	held	$1,001 - $15,000	$15,001 - $50,000	$0	$0
American Funds 529 Institution: American Funds ⇒ CWMAX - American Funds Washington Mutual	JT	held	$1,001 - $15,000	$1,001 - $15,000	$0	$0
TIAA-CREF Research Corp of UH Retirement ⇒ TIQRX - TIAA-CREF Equity Index R (NASDAQ)	—	held	$15,001 - $50,000	$15,001 - $50,000	$0	$0

Residential Property Description: Residential Real Estate (Washington, DC)	JT	held	$250,001 - $500,000	$250,001 - $500,000	$0	$0
Helping Hands Hawaii 403(b) Thrift ⇒ Mutual of America - Calvert VP SRI Balanced Portfolio	—	held	$15,001 - $50,000	$15,001 - $50,000	$0	$0

Largest movers 2024→2025

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
American Funds 529 Institution: American Funds ⇒ CWMAX - American Funds Washington Mutual	JT	held	$1,001 - $15,000	$1,001 - $15,000	$0	$0
Residential Property Description: Residential Real Estate (Washington, DC)	JT	held	$250,001 - $500,000	$250,001 - $500,000	$0	$0
Helping Hands Hawaii 403(b) Thrift ⇒ Mutual of America - Calvert VP SRI Balanced Portfolio	—	held	$15,001 - $50,000	$15,001 - $50,000	$0	$0
TIAA-CREF Research Corp of UH Retirement ⇒ TRRSX - TIAA-CREF Real Estate Sec Retire (NASDA	—	held	$1,001 - $15,000	$1,001 - $15,000	$0	$0
American Funds 529 Institution: American Funds ⇒ CBOAX - American Funds Interm Bd Fd of Am	JT	held	$1,001 - $15,000	$1,001 - $15,000	$0	$0
Bank of Hawaii (Honolulu, HI) Type: Checking, Savings	JT	held	$15,001 - $50,000	$15,001 - $50,000	$0	$0
American Funds 529 Institution: American Funds ⇒ CICAX - American Funds Invmt Co of Amer 5	JT	held	$1,001 - $15,000	$1,001 - $15,000	$0	$0
Inspira - Traditional IRA ⇒ The Standard Guaranteed Fixed Interest Fund Z	SP	held	$1,001 - $15,000	$1,001 - $15,000	$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.