



# PERIODIC TRANSACTION REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Josh Gottheimer  
**Status:** Member  
**State/District:** NJ05

## TRANSACTIONS

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT	AbbVie Inc. (ABBV) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	AbbVie Inc. (ABBV) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/24/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Align Technology, Inc. (ALGN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Alphabet Inc. - Class C Capital Stock (GOOG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Alphabet Inc. - Class C Capital Stock (GOOG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/16/2023	04/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Alphabet Inc. - Class C Capital Stock (GOOG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/23/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Ameris Bancorp (ABCB) [ST]	S (partial)	03/14/2023	04/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Amgen Inc. (AMGN) [ST]	S (partial)	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Amgen Inc. (AMGN) [ST]	S (partial)	03/27/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	AppFolio, Inc. - Class A (APPF) [ST]	P	03/14/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Apple Inc. (AAPL) [ST]	S (partial)	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	ASML Holding N.V. - New York Registry Shares (ASML) [ST]	P	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
	Blackstone Real Estate Income Trust [OT]	P	03/22/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 1 LOCATION: US DESCRIPTION: REIT					
JT	Charles Schwab Corporation (SCHW) [ST]	S (partial)	03/14/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Charles Schwab Corporation (SCHW) [ST]	S (partial)	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Coca-Cola Company (KO) [ST]	S	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>

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	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	ConocoPhillips (COP) [ST]	S (partial)	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	ConocoPhillips (COP) [ST]	S (partial)	03/16/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Crown Castle Inc. (CCI) [ST]	S (partial)	03/16/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Deere & Company (DE) [ST]	S (partial)	03/24/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Eli Lilly and Company (LLY) [ST]	S (partial)	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Fidelity National Information Services, Inc. (FIS) [ST]	S (partial)	03/16/2023	04/06/2023	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Haleon plc American Depositary Shares (HLN) [ST]	P	03/31/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	L'Oreal Co. American Depositary Shares (LRLCY) [ST]	S (partial)	03/10/2023	04/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Lowe's Companies, Inc. (LOW) [ST]	S (partial)	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT	McKesson Corporation (MCK) [ST]	S (partial)	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>	
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1						
JT	MercadoLibre, Inc. (MELI) [ST]	P	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>	
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1						
JT	MercadoLibre, Inc. (MELI) [ST]	P	03/15/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>	
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1						
JT	Microsoft Corporation (MSFT) [ST]	P	03/31/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>	
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1						
JT	Microsoft Corporation (MSFT) [ST]	P	03/24/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>	
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1						
JT	Moderna, Inc. (MRNA) [ST]	P	03/31/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>	
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1						
JT	Morgan Stanley (MS) [ST]	P	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>	
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1						
JT	Netflix, Inc. (NFLX) [ST]	P	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>	
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1						
JT	NVIDIA Corporation (NVDA) [ST]	P	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>	
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1						
JT	PayPal Holdings, Inc. (PYPL) [ST]	S (partial)	03/16/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>	
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1						

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JT	Regeneron Pharmaceuticals, Inc. (REGN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Rockwell Automation, Inc. (ROK) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/27/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Sarepta Therapeutics, Inc. (SRPT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/06/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Seacoast Banking Corporation of Florida (SBCF) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/29/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	SVB Financial Group (SIVB) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	03/09/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/09/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Tesla, Inc. (TSLA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/24/2023	04/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Thoughtworks Holding, Inc. (TWKS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/16/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Veritex Holdings, Inc. (VBTX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/16/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Veritex Holdings, Inc. (VBTX) [ST] FILING STATUS: New	S (partial)	03/14/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1							
JT		Woodside Energy Group Limited American Depositary Shares, each representing one Ordinary Share (WDS) [ST]	S	03/10/2023	04/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
FILING STATUS: New							
SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1							

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## ASSET CLASS DETAILS

- o Morgan Stanley - Active Asset Account # 1  
LOCATION: US
- o Morgan Stanley - Select UMA Account # 1 (Owner: JT)  
LOCATION: US

## INITIAL PUBLIC OFFERINGS

Yes  No

## CERTIFICATION AND SIGNATURE

I CERTIFY that the statements I have made on the attached Periodic Transaction Report are true, complete, and correct to the best of my knowledge and belief. Further, I CERTIFY that I have disclosed all transactions as required by the STOCK Act.

**Digitally Signed:** Hon. Josh Gottheimer , 04/20/2023