

## Annual Report for Calendar 2024

## The Honorable Bernard Sanders (Sanders, Bernard)

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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	Self	Pension	City of Burlington Vermont Burlington, VT	\$6,221.52	n/a
2	Self	Royalties	Penguin Random House LLC Alexandria, VA	\$148,750.00	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	<b>Spouse Retirement plan</b> <i>Filer comment: These are not individually held stocks. They are Jane's 401k TIAA-CREF teacher retirement fund.</i>	Retirement Plans Defined Contribution Pension Plan	Spouse			
1.1	<b>CREF Stock Account - R1</b>	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
1.2	<b>CREF Growth Account - R1</b>	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
1.3	<b>CREF Global Equities Account</b>	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
1.4	<b>TIAA-CREF Mid-Cap Growth Retire</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
1.5	<b>TIAA-CREF Real Estate Sec Instl</b>	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
1.6	<b>CREF Bond Market Account - R1</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
1.7	<b>TIAA-CREF Social Choice Eq Instl</b>	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
1.8	<b>Teachers Personal Annuity Fixed Account</b> <i>Provider: TIAA-CREF</i>	Annuity Fixed	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
1.9	<b>TIAA Traditional Annuity</b> <i>Provider: TIAA-CREF</i>	Annuity Fixed	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
1.10	<b>TIAA Teacher's Personal Annuity Stock Account</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
1.11	<b>CREF Inflation Linked Bond</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
1.12	<b>CREF Equity Index</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
2	<b>Spouse Retirement Plan 2</b> <i>Filer comment: These funds are not individually held stocks. They are in Jane's 401k VALIC teacher retirement fund.</i>	Retirement Plans Defined Contribution Pension Plan	Spouse			
2.1	<b>VALIC American Beacon Broadway Large Cap</b>	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
2.2	<b>VALIC Growth Fund</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
2.3	<b>VALIC Socially Responsible</b>	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
2.4	<b>VALIC Mid Cap Index</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
2.5	<b>VALIC Small Cap Fund</b>	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
2.6	<b>VALIC Small Cap Index</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
2.7	<b>VALIC Intl Socially Responsible Fund</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
2.8	<b>VALIC International Eqs Idx</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
2.9	<b>VALIC Inflation Protected Fund</b>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
2.10	<b>VALIC Small Cap Aggressive Growth</b>	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
2.11	<b>VALIC Small Mid-Growth Fund</b>	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
2.12	<b>VALIC Fixed Account Plus</b>	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
3	<b>Spousal Retirement IRA</b>	Retirement Plans IRA	Spouse			
3.1	<b>U.S. Federal Credit Union</b> <i>(Burlington, VT)</i> <b>Type:</b> IRA Cash Accounts,	Bank Deposit	Spouse	\$50,000 - \$100,000	Dividends, Interest	\$1,001 - \$2,500
3.2	<b>North Country Federal Credit Union</b> <i>(Burlington, VT)</i> <b>Type:</b> Certificate of Deposit, IRA Cash Accounts,	Bank Deposit	Spouse	\$15,001 - \$50,000	Interest	None (or less than \$201)
4	<b>City of Burlington Pension Plan</b> <i>Filer comment: Pension income reported in Part 2.</i>	Retirement Plans Defined Benefit Pension Plan	Self	Unascertainable	None, Interest	None (or less than \$201)
5	<b>U.S. Senate DC Federal Credit Union</b> <i>(Washington, DC)</i> <b>Type:</b> Checking, Savings,	Bank Deposit	Joint	\$100,001 - \$250,000	Dividends, Interest	\$2,501 - \$5,000
6	<b>M &amp; T Bank</b> <i>(Burlington, VT)</i> <b>Type:</b> Checking, Savings,	Bank Deposit	Joint	\$15,001 - \$50,000	Interest	None (or less than \$201)
7	<b>North Country Federal Credit Union</b> <i>(Burlington, VT)</i> <b>Type:</b> Certificate of Deposit, Checking, Money Market Account, Savings,	Bank Deposit	Spouse	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000
8	<b>United States Congressional Credit Union</b> <i>(Washington, DC)</i> <b>Type:</b> Certificate of Deposit, Checking, Savings,	Bank Deposit	Joint	\$15,001 - \$50,000	Interest	\$201 - \$1,000

## 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? **No**

## 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 liability worth more than \$10,000 at any time or a revolving charge whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	Incurred	Debtor	Type	Points (Term)	Rate	Amount	Creditor	Comments
1	2013	Joint	Mortgage	.40	8.0% (30 years)	\$100,001 - \$250,000	Quicken Loans/Rocket Mortgage Detroit, MI	n/a

## Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **Yes**

#	Position Dates	Position Held	Entity	Entity Type	Comments
1	Aug 2016 to present	Trustee	Islands Family Trust	Trust	I am a co-trustee in a family trust created when we bought a summer home.

## Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **Yes**

#	Date Involved	Type	Status and Terms	Comments
1	Feb 2011	Avalon Publishing Group	Royalty Agreement	Royalty agreement with the publisher to have them donate all royalties from proceeds of the sale of "The Speech" directly to charity.
2	Oct 1999	Verso Publications	Royalty Agreement	Standard Royalty Agreement with Verso Publications regarding sales of "Outsider in the House" and "Outsider in the Outside House."
3	Jul 2016	Macmillan - St. Martin's Press	Royalty Agreement	Contract with St. Martin's Press to write "Our Revolution: A Future To Believe In" that was published in November 2016.
4	Aug 2016	Macmillan - Henry Holt and Company LLC	Royalty Agreement	Contract with Henry Holt and Company to write a book for young adults to be published in 2017.
5	Jul 2016	Todd R. Lockwood	Royalty Agreement	Royalty Agreement from the sales for the Bernie Sanders - We Shall Overcome album.
6	Feb 2017	Macmillan - St. Martin's Press	Royalty Agreement	Contract with St. Martin's Press to write "Where Do We Go From Here?"
7	May 2020	Penguin Random House LLC	Royalty Agreement	Contract with Penguin Random House to write "It's Okay To Be Angry About Capitalism"

## Part 10. Compensation

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 &amp; Comments

No attachments added.

No comments added.