

United States Senate

Financial Disclosures

Annual Report for Calendar 2025

The Honorable Bernard Sanders (Sanders, Bernard)

 **Filed 08/13/2026 @ 10:15 AM**

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	\$6,408.12	n/a
2	Self	Royalties	Penguin Random House LLC Alexandria, VA	\$200,000.00	n/a
3	Spouse	Retirement	TIAA-CREF New York, NY	> \$1,000	n/a
4	Spouse	Retirement	VALIC Houston, TX	> \$1,000	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	Spouse Retirement plan <i>Filer comment:</i> These are not individually held stocks. They are Jane's 401k TIAA-CREF teacher retirement fund.	Retirement Plans 401(k), 403(b), or other Defined Contribution Plan.	Spouse	--		

1.1	CREF Stock Account - R1	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	None (or less than \$201)
1.2	CREF Growth Account - R1	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund	None (or less than \$201)
1.3	CREF Global Equities Account	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	None (or less than \$201)
1.4	TIAA-CREF Mid-Cap Growth Retire	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
1.5	TIAA-CREF Real Estate Sec Instl	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	None (or less than \$201)
1.6	CREF Bond Market Account - R1	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
1.7	TIAA-CREF Social Choice Eq Instl	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	None (or less than \$201)
1.8	Teachers Personal Annuity Fixed Account <i>Provider: TIAA-CREF</i>	Annuity Fixed	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
1.9	TIAA Traditional Annuity <i>Provider: TIAA-CREF</i>	Annuity Fixed	Spouse	\$50,001 - \$100,000	Excepted Investment Fund	None (or less than \$201)
1.10	TIAA Teacher's Personal Annuity Stock Account	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
1.11	CREF Inflation Linked Bond	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
1.12	CREF Equity Index	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
2	Spouse Retirement Plan 2	Retirement Plans 401(k),	Spouse	--		

Filer comment: These funds are not individually held stocks. They are in Jane's 401k VALIC teacher retirement fund.

403(b), or other Defined Contribution Plan.

2.1	VALIC American Beacon Broadway Large Cap	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	None (or less than \$201)
2.2	VALIC Growth Fund	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	None (or less than \$201)
2.3	VALIC Socially Responsible	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund	None (or less than \$201)
2.4	VALIC Mid Cap Index	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
2.5	VALIC Small Cap Index	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
2.6	VALIC Intl Socially Responsible Fund	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	None (or less than \$201)
2.7	VALIC International Eqs Idx	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
2.8	VALIC Inflation Protected Fund	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund	None (or less than \$201)
2.9	VALIC Small Cap Aggressive Growth	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund	None (or less than \$201)
2.10	VALIC Fixed Account Plus	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund	None (or less than \$201)
2.11	VALIC Mid Cap Strategic	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment	None (or less than \$201)

Fund					Fund	
3	Spousal Retirement IRA	Retirement Plans IRA	Spouse	--		
3.1	U.S. Federal Credit Union (Burlington, VT) <i>Type: IRA Cash Accounts</i>	Bank Deposit	Spouse	\$15,001 - \$50,000	Dividends	\$201 - \$1,000
3.2	North Country Federal Credit Union (Burlington, VT) <i>Type: Certificate of Deposit, IRA Cash Accounts</i>	Bank Deposit	Spouse	\$15,001 - \$50,000	Interest	\$2,501 - \$5,000
4	City of Burlington Pension Plan <i>Filer comment: Pension income reported in Part 2.</i>	Retirement Plans Defined Benefit Pension Plan	Self	Unascertainable	None	None (or less than \$201)
5	U.S. Senate Federal Credit Union (Washington, DC) <i>Type: Checking, Savings</i>	Bank Deposit	Joint	\$100,001 - \$250,000	Dividends	\$201 - \$1,000
6	M & T Bank (Burlington, VT) <i>Type: Checking, Savings</i>	Bank Deposit	Joint	\$1,001 - \$15,000	Interest	None (or less than \$201)
7	North Country Federal Credit Union (Burlington, VT)	Bank Deposit	Spouse	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000

Type:
Certificate of
Deposit,
Checking,
Money Market
Account,
Savings

8	United States Congressional Credit Union (Washington, DC) Type: Certificate of Deposit, Checking, Savings	Bank Deposit	Joint	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500
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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? **Yes**

#	Owner	Tick- er	Asset Name	Trans- action Type	Transac- tion Date	Amount	Comments
1	Spouse	--	VALIC Fixed Account Plus	Sale (Partial)	03/31/2025	\$1,001 - \$15,000	n/a
2	Spouse	--	VALIC Socially Responsible Fund	Sale (Partial)	03/31/2025	\$1,001 - \$15,000	n/a
3	Spouse	--	TIAA_CREF Real Estate	Sale (Partial)	03/31/2025	\$15,001 - \$50,000	n/a
4	Spouse	--	CREF Growth Account - R1	Sale (Partial)	12/31/2025	\$1,001 - \$15,000	n/a

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**? **Yes**

#	Date(s)	Traveler(s)	Travel Type	Itinerary	Reimbursed For	Who Paid	Comments
1	05/22/2025 to 05/28/2025	Self , Spouse	Privately-Sponsored	DC to Dublin & return; give Annual Robert Tressell Festival Lecture; meet w/union leaders, former & current Presidents, elected public officials, local leaders and have media interviews	Airfare, car transportation, accomodation & meals	Robert Tressell Organizing Committee Dublin, Ireland	n/a
2	12/04/2025 to 12/04/2025	Self	Privately-Sponsored	DC to Charlottesville Virginia and return. Interview with reporter for public speaking event at the University of Virginia Center for Politics	Car and driver to public interview and back.	University of Virginia Center for Politics Charlottesville, VA	n/a

Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	In-curred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2013	Joint	Mortgage	.40	8.0% (30 years)	\$100,001 - \$250,000	Quicken Loans/Rocket Mortgage Detroit, MI	n/a
2	2025	Joint	Mortgage	0	5.5% (8 years)	\$100,001 - \$250,000	Quicken Loans/Rocket Mortgage Detroit, MI	Refinanced 2103 loan

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 North Hero, Vermont	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	Parties Involved	Type	Status and Terms	Comments
1	Feb 2011	Avalon Publishing Group Berkeley, CA	Royalty Agreement	Royalty agreement with the publisher to have them donate all	n/a

				royalties from proceeds of the sale of "The Speech" directly to charity.	
2	Oct 1990	Verso Publications New York, NY	Royalty Agreement	Standard Royalty Agreement with Verso Publications regarding sales of "Outsider in the House" and "Outsider in the White House."	n/a
3	Jul 2016	Macmillan - St. Martin's Press New York, NY	Royalty Agreement	Contract with St. Martin's Press to write "Our Revolution: A Future To Believe In" that was published in November 2016.	n/a
4	Aug 2016	Macmillan - Henry Holt and Company, LLC New York, NY	Royalty Agreement	Contract with Henry Holt and Company to write a book for young adults to be published in 2017.	n/a
5	Jul 2016	Todd R. Lockwood S. Burlington, Vermont	Royalty Agreement	Royalty agreement from the sales for the Bernie Sanders - We shall Overcome album.	n/a
6	Feb 2017	Macmillan - St. Martin's Press, LLC New York, NY	Royalty Agreement	Contract with St. Martin's Press to write "Where Do We Go From Here?"	n/a
7	May 2020	Penguin Random House LLC Alexandria, VA	Royalty Agreement	Contract with Penguin Random House to write "It's Okay To Be Angry About Capitalism"	n/a
8	Jul 2025	Penguin Publishing	Royalty Agreement	Contract agreement with	n/a

New York,
NY

Penguin/Random
House to write
"Fighting
Oligarchy"

Part 10. Compensation

Only required if you are a candidate or this is your first report: Did any person or entity pay more than \$5,000 to you or for services provided by you? **No**

Attachments & Comments

No attachments added.

No comments added.