

HR 1013

Retirement Fairness for Charities and Educational Institutions Act of 2025

Congress: 119 (2025–2027, Current)

Chamber: House

Policy Area: Finance and Financial Sector

Introduced: Feb 5, 2025

Current Status: Placed on the Union Calendar, Calendar No. 340.

Latest Action: Placed on the Union Calendar, Calendar No. 340. (Nov 28, 2025)

Official Text: <https://www.congress.gov/bill/119th-congress/house-bill/1013>

Sponsor

Name: Rep. Lucas, Frank D. [R-OK-3]

Party: Republican • **State:** OK • **Chamber:** House

Cosponsors (24 total)

Cosponsor	Party / State	Role	Date Joined
Rep. Barr, Andy [R-KY-6]	R · KY		Feb 5, 2025
Rep. Foster, Bill [D-IL-11]	D · IL		Feb 5, 2025
Rep. Gottheimer, Josh [D-NJ-5]	D · NJ		Feb 5, 2025
Rep. Meuser, Daniel [R-PA-9]	R · PA		Feb 21, 2025
Rep. Nunn, Zachary [R-IA-3]	R · IA		Mar 3, 2025
Rep. Pettersen, Brittany [D-CO-7]	D · CO		Mar 3, 2025
Rep. Morelle, Joseph D. [D-NY-25]	D · NY		Mar 4, 2025
Rep. Panetta, Jimmy [D-CA-19]	D · CA		Mar 10, 2025
Rep. Sessions, Pete [R-TX-17]	R · TX		Mar 24, 2025
Rep. Sewell, Terri A. [D-AL-7]	D · AL		Apr 7, 2025
Rep. Suozzi, Thomas R. [D-NY-3]	D · NY		Apr 24, 2025
Rep. Neguse, Joe [D-CO-2]	D · CO		May 15, 2025
Rep. Vindman, Eugene Simon [D-VA-7]	D · VA		May 21, 2025
Rep. Harder, Josh [D-CA-9]	D · CA		May 29, 2025
Rep. Lawler, Michael [R-NY-17]	R · NY		Jun 3, 2025
Rep. Norcross, Donald [D-NJ-1]	D · NJ		Jun 26, 2025
Rep. Scott, David [D-GA-13]	D · GA		Jul 16, 2025
Rep. Houlahan, Chrissy [D-PA-6]	D · PA		Jul 22, 2025
Rep. Bynum, Janelle S. [D-OR-5]	D · OR		Aug 15, 2025
Rep. Schneider, Bradley Scott [D-IL-10]	D · IL		Sep 15, 2025
Rep. Davis, Donald G. [D-NC-1]	D · NC		Sep 30, 2025
Rep. McBride, Sarah [D-DE-At Large]	D · DE		Sep 30, 2025
Rep. Horsford, Steven [D-NV-4]	D · NV		Oct 24, 2025
Rep. Courtney, Joe [D-CT-2]	D · CT		Nov 19, 2025

Committee Activity

Committee	Chamber	Activity	Date
Financial Services Committee	House	Markup By	May 20, 2025
Financial Services Committee	House	Reported By	Nov 28, 2025

Subjects & Policy Tags

Policy Area:

Finance and Financial Sector

Related Bills

Bill	Relationship	Last Action
119 S 424	Related bill	Feb 5, 2025: Read twice and referred to the Committee on Banking, Housing, and Urban Affairs.

Summary (as of Feb 5, 2025)

Retirement Fairness for Charities and Educational Institutions Act of 2025

This bill allows 403(b) retirement plans (i.e., retirement plans designed for certain employees of public schools, charities, and churches) to invest in collective investment trusts, which are a group of pooled investment assets held by a bank or trust company, and in insurance company separate accounts.

