



Filing ID #10059269

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Patrick James Briody
Status: Congressional Candidate
State/District: AZo8

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/11/2024
Period Covered: 01/01/2023– 04/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BlackRock Tactical Opportunities Fund - Institutional (PBAIX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	None
IRA FBO PATRICK BRIODY ⇒ BlackRock Global Equity Market Neutral Fund - Institutional (BDMIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ BlackRock Tactical Opportunities Fund - Institutional (PBAIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ DYNF [OT] DESCRIPTION: DYNF		\$15,001 - \$50,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ GLD [OP] DESCRIPTION: GLD		\$15,001 - \$50,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ Guggenheim Macro Opportunities Fund- Institutional Class (GIOIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRA FBO PATRICK BRIODY ⇒ IQLT [OT] DESCRIPTION: IQLT		\$15,001 - \$50,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ IUSB [OT] DESCRIPTION: IUSB		\$50,001 - \$100,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ MFS International Equity Fund - Class I (MIEKX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ QQQ [OT] DESCRIPTION: QQQ		\$50,001 - \$100,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ QUAL [OT] DESCRIPTION: QUAL		\$50,001 - \$100,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ RDVY [OT] DESCRIPTION: RDVY		\$50,001 - \$100,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ WINN [OT] DESCRIPTION: WINN		\$15,001 - \$50,000	Tax-Deferred		
IRA FBO PATRICK BRIODY ⇒ XLG [OT] DESCRIPTION: XLG		\$15,001 - \$50,000	Tax-Deferred		
PATRICIA BRIODY ⇒ DIGNITY HEALTH PENSION [PE]	SP	\$100,001 - \$250,000	Tax-Deferred		
PATRICK & PATRICIA BRIODY JOINT ⇒ BlackRock HY Muni Fd I (MAYHX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PATRICK & PATRICIA BRIODY JOINT ⇒ FDL [OT] DESCRIPTION: FDL	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
PATRICK & PATRICIA BRIODY JOINT ⇒ GLD [OP] DESCRIPTION: EQUITY	JT	\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
PATRICK & PATRICIA BRIODY JOINT ⇒ Hartford Schroders Tax-Aware Bond Fund (STWTX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PATRICK & PATRICIA BRIODY JOINT ⇒ JIRE [OT] DESCRIPTION: JIRE	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$201 - \$1,000
PATRICK & PATRICIA BRIODY JOINT ⇒ JPEF [OT] DESCRIPTION: JPEF	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
PATRICK & PATRICIA BRIODY JOINT ⇒ JPME [OT] DESCRIPTION: JPME	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PATRICK & PATRICIA BRIODY JOINT ⇒ PIMCO National Intermediate Municipal Bond Fund Class I-2 (PMNPX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PATRICK & PATRICIA BRIODY JOINT ⇒ QQQ [OT] DESCRIPTION: QQQ	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
PATRICK & PATRICIA BRIODY JOINT ⇒ SDVY [OT] DESCRIPTION: SDVY	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PATRICK & PATRICIA BRIODY JOINT ⇒ SLYG [OT] DESCRIPTION: SLYG	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
PATRICK & PATRICIA BRIODY JOINT ⇒ VLU [OT] DESCRIPTION: VLU	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
PATRICK & PATRICIA BRIODY JOINT ⇒ WINN [OT] DESCRIPTION: WINN	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
PATRICK & PATRICIA BRIODY JOINT ⇒ XLG [OT] DESCRIPTION: XLG	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
Wells Fargo [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200

* Investment vehicle details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Dignity Health & PJB Sales & Consulting	Spouse's salary & PJB Sales & Consulting	\$71,120.00	\$211,289.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Treasurer of my campaign.	Patrick "Pat" Briody for Congress

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Source (Name and Address)	Brief Description of Duties
WVB Financial Services, Inc (Ivanhoe, IL, US)	Sales and Consulting

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">IRA FBO PATRICK BRIODYPATRICIA BRIODY (Owner: SP)PATRICK & PATRICIA BRIODY JOINT (Owner: JT) LOCATION: US

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Patrick James Briody , 05/11/2024