



Filing ID #10060520

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: John McCloy
Status: Congressional Candidate
State/District: FL11

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/15/2024
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
Alliance Credit Union [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Bank of America bank accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Chase bank accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Chevron Corporation Common Stock (CVX) [ST]		\$50,001 - \$100,000	None		
Chevron Federal Credit Union [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Delaware Small Cap Value Fund Institutional Class (DEVIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity BTC EQUITY INDEX C [PS]		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Fidelity 401K managed funds					
Fidelity BTC EXTENDED MKTS M [PS]		\$500,001 - \$1,000,000	Tax-Deferred		
DESCRIPTION: Fidelity 401K managed funds					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity BTC LIFEPATH 2040 C [PS] DESCRIPTION: Fidelity 401K managed funds		\$15,001 - \$50,000	Tax-Deferred		
Fidelity BTC LIFEPATH 2045 C [PS] DESCRIPTION: Fidelity 401K managed funds		\$50,001 - \$100,000	Tax-Deferred		
Fidelity BTC MSCI ACWI EXUS C [PS] DESCRIPTION: Fidelity 401K managed funds		\$1 - \$1,000	Tax-Deferred		
Fidelity IRA cash [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity SAI Inflation-Focused Fund (FIFGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity SAI U.S. Treasury Bond Index Fund (FUTBX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Strategic Advisors Emerging Markets Fund (FSAMX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Navy Federal Credit Union [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
New Perspective Fund, Class R-4 Shares (RNPEX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Niagara Falls 3-unit Rental [RP] LOCATION: Niagara Falls, NY, US	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
Niagara Falls Single-Family Rental [RP] LOCATION: Niagara Falls, NY, US	JT	\$50,001 - \$100,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
Pentagon Federal Credit Union [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Poughkeepsie Rental [RP] LOCATION: Poughkeepsie, NY, US	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
Principal Fds, Inc. MidCap Fd Institutional Cl (PCBIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Richmond Rental House 1 [RP]	JT	\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
LOCATION: Richmond, VA, US					
Richmond Rental House 2 [RP]	JT	\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
LOCATION: Richmond, VA, US					
Richmond Rental House 3 [RP]	JT	\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
LOCATION: Richmond, VA, US					
Richmond Rental House 4 [RP]	JT	\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
LOCATION: Richmond, VA, US					
Richmond Rental House 5 [RP]	JT	\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
LOCATION: Richmond, VA, US					
Richmond Rental House 6 [RP]	JT	\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
LOCATION: Richmond, VA, US					
Schwab IRA cash [IH]		\$1,001 - \$15,000	Tax-Deferred		
Strategic Advisers Alternatives Fund (FSLTX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Strategic Advisers Core Income Fund (FPCIX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Strategic Advisers Income Opportunities Fund (FPIOX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Strategic Advisers International Fund (FILFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Strategic Advisers Large Cap Fund (FALCX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Strategic Advisers Short Duration Fund (FAUDX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Strategic Advisers Small-Mid Cap Fund (FSCFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Texas Rental 1 [RP]	JT	\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Katy, TX, US					
Texas Rental 2 [RP]	JT	\$100,001 - \$250,000	Rent	None	\$5,001 - \$15,000
LOCATION: Katy, TX, US					
Truist bank accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
USB Bank [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Vanguard Index Trust Small-Cap Index Fund Instl Shares (VSCIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Wells Fargo bank accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

* 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
OST, Inc.	salary	\$41,000.00	\$120,000.00
University of Louisiana	spouse salary	\$24,000.00	\$72,000.00
Regis University	spouse salary	\$30,000.00	\$90,000.00
Arizona University	spouse salary	\$4,000.00	\$12,000.00
Post University	spouse salary	\$4,000.00	\$9,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Freedom Mortgage	Feb 2019	Mortgage on primary residence	\$250,001 - \$500,000
	Bank of America	2007	Mortgage on Texas Rental 1	\$50,001 - \$100,000
JT	Mr. Cooper Mortgage	2002	Mortgage on Texas Rental 2	\$50,001 -

Owner	Creditor	Date Incurred	Type	Amount of Liability
				\$100,000
	First Reliance Mortgage	Nov 2015	Mortgage on Richmond Rental 6	\$15,001 - \$50,000
	Ulster Savings	2014	Mortgage on Poughkeepsie Rental	\$50,001 - \$100,000
	Pentagon Federal Credit Union	Jun 2023	Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

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: John McCloy , 05/15/2024