



Filing ID #10055862

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Conor O'Callaghan
Status: Congressional Candidate
State/District: AZ01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 10/30/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401Ks ⇒ Empower 401k(s) [OT] DESCRIPTION: Barclays and Brownstone 401ks		\$50,001 - \$100,000	Tax-Deferred		
401Ks ⇒ Fidelity 401k [OT] DESCRIPTION: Credit Suisse 401k		\$100,001 - \$250,000	Tax-Deferred		
401Ks ⇒ John Hancock 401k [OT] DESCRIPTION: BTIG 401k		\$50,001 - \$100,000	Tax-Deferred		
401Ks ⇒ Spouse's Fidelity 401k [OT] DESCRIPTION: Wife's Credit Suisse 401k		\$100,001 - \$250,000	Tax-Deferred		
401Ks ⇒ Vanguard 401k [OT] DESCRIPTION: Nomura 401k		\$500,001 - \$1,000,000	Tax-Deferred		
529 Plan [5P] LOCATION: NY	DC	\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Cameron O'Callaghan					
529 Plan [5P]	DC	\$50,001 - \$100,000	Tax-Deferred		
LOCATION: NY DESCRIPTION: Parker O'Callaghan					
529 Plan [5P]	DC	\$15,001 - \$50,000	Tax-Deferred		
LOCATION: NY DESCRIPTION: Liam O'Callaghan					
Arizona Bank & Trust Bank Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Autos [CO]		\$1,000,001 - \$5,000,000	None		
Capital One 360 Bank Account(s) [BA]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Chase Bank Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
FMC Mintable LLC [PS]		\$100,001 - \$250,000	None		
DESCRIPTION: Private market (Series A) investment in Mintable					
Home [RP]		\$1,000,001 - \$5,000,000	None		
LOCATION: Scottsdale, AZ, US					
Mass Mutual Whole Life Policies [WU]		\$500,001 - \$1,000,000	None		
SoFi Bank Account(s) [BA]		\$500,001 - \$1,000,000	Interest	\$5,001 - \$15,000	\$1,001 - \$2,500
TD Bank Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Wells Fargo Bank Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200

* Asset class 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
BTIG LLC	Salary + commission	\$2,326,352.70	\$1,399,613.16

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo Bank	February 2021	Home Mortgage	\$1,000,001 - \$5,000,000
	Arizona Bank & Trust	February 2022	Home Equity Loan	\$250,001 - \$500,000
	Bank of America	April 2023	Auto Loan	\$100,001 - \$250,000
	Bank of America	September 2022	Auto Loan	\$50,001 - \$100,000
	Wells Fargo Bank	November 2022	Auto Loan	\$50,001 - \$100,000
	LightStream	November 2022	Auto Loan	\$50,001 - \$100,000
	LightStream	May 2020	Auto Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Managing Director & Head of Structured Product Sales	BTIG LLC

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
BTIG LLC (Scottsdale, AZ, US)	Employment (Financial Services)
Brownstone Investment Group (Scottsdale, AZ, US)	Employment (Financial Services)

SCHEDULE A ASSET CLASS DETAILS

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401Ks

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: Conor O'Callaghan , 10/30/2023