



Filing ID #10070512

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Effie Phillips-Staley
Status: Congressional Candidate
State/District: NY17

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 09/09/2025
Period Covered: 01/01/2024– 08/10/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CMA ⇒ American Funds Capital World Growth & Income Fund Class A Shares (CWGIX) [MF]	JT	\$117,596.39	Dividends	\$878.78	\$1,773.54
CMA ⇒ BLF Fed Fund [BA]	JT	\$36,831.00	Dividends	\$8,974.90	None
CMA ⇒ SPDR S&P 500 Buyback ETF (SPYB) [ET]	JT	\$77,859.60	Dividends	\$650.66	\$847.80
CMA ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]	JT	\$67,738.35	None		
CMA ⇒ Washington Mutual Invs Fd Cl A Shs (AWSHX) [MF]	JT	\$414,552.44	Dividends	\$2,565.14	\$5,411.82
CMA ⇒ Washington Mutual Invs Fd Cl A Shs (AWSHX) [MF]	JT	\$414,552.44	Capital Gains	\$16,973.75	\$33,340.63
CMA ⇒ Wynn Resorts, Limited - Common Stock (WYNN) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Equities ⇒ AerCap Holdings N.V. Ordinary Shares (AER) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Alliant Energy Corporation (LNT) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Allstate Corporation (ALL) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	JT	\$15,001 - \$50,000	None		
Equities ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	JT	\$15,001 - \$50,000	None		
Equities ⇒ American Healthcare REIT, Inc. Common Stock (AHR) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ AMETEK, Inc. (AME) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Apple Inc. - Common Stock (AAPL) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Applied Materials, Inc. - Common Stock (AMAT) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Arista Networks, Inc. Common Stock (ANET) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Becton, Dickinson and Company Common Stock (BDX) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ BellRing Brands, Inc. Common Stock (BRBR) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Cameco Corporation Common Stock (CCJ) [ST]					
Equities ⇒ Capital One Financial Corporation Common Stock (COF) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Carnival Corporation Common Stock (CCL) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Cencora, Inc. Common Stock (COR) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Cheniere Energy, Inc. Common Stock (LNG) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Colgate-Palmolive Company Common Stock (CL) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Compass Group Plc American Depositary Shares (CMPGY) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Coterra Energy Inc. Common Stock (CTRA) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ CSX Corporation (CSX) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Darden Restaurants, Inc. Common Stock (DRI) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ DaVita Inc. Common Stock (DVA) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ DoorDash, Inc. - Common Stock (DASH) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Dover Corporation Common Stock (DOV) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Fiserv, Inc. Common Stock (FI) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
GoDaddy Inc. Class A Common Stock (GDDY) [ST]					
Equities ⇒ Home Depot, Inc. (HD) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ HubSpot, Inc. Common Stock (HUBS) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Huntington Bancshares Incorporated - Common Stock (HBAN) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Interactive Brokers Group, Inc. - Class A Common Stock (IBKR) [ST]	JT	\$15,001 - \$50,000	None		
Equities ⇒ Intuit Inc. - Common Stock (INTU) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ IQVIA Holdings, Inc. Common Stock (IQV) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ ITT Inc. Common Stock (ITT) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Jacobs Solutions Inc. Common Stock (J) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Kyndryl Holdings, Inc. Common Stock (KD) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Mastercard Incorporated Common Stock (MA) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	JT	\$15,001 - \$50,000	None		
Equities ⇒ Nasdaq, Inc. - Common Stock (NDAQ) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ON Semiconductor Corporation - Common Stock (ON) [ST]					
Equities ⇒ Otis Worldwide Corporation Common Stock (OTIS) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ PROG Holdings, Inc. Common Stock (PRG) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ PTC Inc. - Common Stock (PTC) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Public Service Enterprise Group Incorporated Common Stock (PEG) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Quanta Services, Inc. Common Stock (PWR) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Quest Diagnostics Incorporated Common Stock (DGX) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ ROCHE HOLDING LTD S/ADR (RHHBY) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Samsara Inc. Class A Common Stock (IOT) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ SBA Communications Corporation - Class A Common Stock (SBAC) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Seagate Technology Holdings PLC - Ordinary Shares (STX) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Sealed Air Corporation Common Stock (SEE) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Sherwin-Williams Company (SHW) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Sprouts Farmers Market, Inc. - Common Stock (SFM)	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[ST]					
Equities ⇒ Synchrony Financial Common Stock (SYF) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Texas Instruments Incorporated - Common Stock (TXN) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ The Cigna Group Common Stock (CI) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ TJX Companies, Inc. (TJX) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Trane Technologies plc (TT) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ United Rentals, Inc. Common Stock (URI) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ Vulcan Materials Company (VMC) [ST]	JT	\$1,001 - \$15,000	None		
Equities ⇒ W.W. Grainger, Inc. Common Stock (GWW) [ST]	JT	\$1,001 - \$15,000	None		
IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		\$1,001 - \$15,000	None		
IRA ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		\$15,001 - \$50,000	None		
IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		\$1,001 - \$15,000	None		
IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		\$1,001 - \$15,000	None		
IRRA ⇒ Allstate Corporation (ALL) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRRA ⇒ American Express Company Common Stock (AXP) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ AstraZeneca PLC - American Depositary Shares (AZN) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ AT&T Inc. (T) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ BlackRock, Inc. Common Stock (BLK) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ CSX Corporation (CSX) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Digital Realty Trust, Inc. Common Stock (DLR) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Eli Lilly and Company Common Stock (LLY) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Emerson Electric Company Common Stock (EMR) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Freeport-McMoRan, Inc. Common Stock (FCX) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ General Dynamics Corporation Common Stock (GD) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Gilead Sciences, Inc. - Common Stock (GILD) [ST]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRRA ⇒ HCA Healthcare, Inc. Common Stock (HCA) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Hewlett Packard Enterprise Company Common Stock (HPE) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Home Depot, Inc. (HD) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ HP Inc. Common Stock (HPQ) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ International Business Machines Corporation Common Stock (IBM) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Invesco Preferred ETF (PGX) [EF]	SP	\$1 - \$1,000	None		
IRRA ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ iShares MBS ETF (MBB) [EF]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ iShares TIPS Bond ETF (TIP) [EF]	SP	\$1 - \$1,000	None		
IRRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Kinder Morgan, Inc. Common Stock (KMI) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRRA ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Pepsico, Inc. (PEP) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Principal Financial Group Inc (PFG) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Realty Income Corporation Common Stock (O) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ RTX Corporation Common Stock (RTX) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Seagate Technology Holdings PLC - Ordinary Shares (STX) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Simon Property Group, Inc. Common Stock (SPG) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Synchrony Financial Common Stock (SYF) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Texas Instruments Incorporated - Common Stock (TXN) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ TJX Companies, Inc. (TJX) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Truist Financial Corporation Common Stock (TFC) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒	SP	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Growth ETF (VUG) [EF]					
IRRA ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Vanguard Small-Cap Growth ETF (VBK) [EF]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	\$1 - \$1,000	None		
IRRA ⇒ Vanguard Value ETF (VTV) [EF]	SP	\$15,001 - \$50,000	None		
IRRA ⇒ Walmart Inc. Common Stock (WMT) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Wells Fargo & Company Common Stock (WFC) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Welltower Inc. Common Stock (WELL) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Williams Companies, Inc. (WMB) [ST]	SP	\$1,001 - \$15,000	None		
IRRA ⇒ Xcel Energy Inc. (XEL) [ST]	SP	\$1,001 - \$15,000	None		
Munis ⇒ LONG IS PWR AUTH N Y ELEC SYS REV GEN BDS F [GS]	JT	\$1,001 - \$15,000	None		
Munis ⇒ ML Bank Deposit Program [BA]	JT	\$1,001 - \$15,000	None		
Munis ⇒	JT	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
NEW YORK N Y GO BDS FISCAL SER A [GS]					
Munis ⇒ NEW YORK NY CTY TRANS FIN AT FUTURE TAX SECD [GS]	JT	\$1,001 - \$15,000	None		
Munis ⇒ NEW YORK NY MUN WFA WTR-SS REV SECOND GEN CC [GS]	JT	\$1,001 - \$15,000	None		
Munis ⇒ NEW YORK ST TWY AUTH ST PERS INCOME TAX REV A [GS]	JT	\$1,001 - \$15,000	None		
Munis ⇒ NY ST DORM AUTH SLS TAX REV BDS SER B [GS]	JT	\$1,001 - \$15,000	None		
Munis ⇒ NY ST DRM AT RV NON ST SUP DBT REF BDS SER A [GS]	JT	\$1,001 - \$15,000	None		
Munis ⇒ PORT AUTH N Y & N J CONSOLIDATED BDS 248 [GS]	JT	\$1,001 - \$15,000	None		
Munis ⇒ TRIBOROUGH BRDG & TUNL AT NY BD ANTIC NTS B-2 [GS]	JT	\$1,001 - \$15,000	None		
Munis ⇒ TRIBOROUGH BRDG & TUNL AT NY BDS SER A [GS]	JT	\$1,001 - \$15,000	None		
Munis ⇒ TRIBOROUGH BRDG & TUNL AT NY SR LIEN REF GREEN [GS]	JT	\$1,001 - \$15,000	None		
Munis ⇒ TRIBOROUGH BRDG & TUNL AUTH NY REVS GEN REV [GS]	JT	\$1,001 - \$15,000	None		
Roth IRA ⇒ IIAXX [BA]		\$1,001 - \$15,000	None		
Roth IRA ⇒ IIAXX [BA]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA ⇒ MSIF Growth Portfolio Class A (MSEGX) [MF]	SP	\$50,001 - \$100,000	None		
SEP ⇒ Hartford Core Equity Fund Class A (HAIAX) [MF]		\$15,001 - \$50,000	None		
SEP MOD CORE ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [EF]		\$1,001 - \$15,000	None		
SEP MOD CORE ⇒ iShares Core S&P U.S. Value ETF (IUSV) [EF]		\$1,001 - \$15,000	None		
UTMA ⇒ Hartford Core Equity Fund Class A (HAIAX) [MF]		\$15,001 - \$50,000	None		
UTMA ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]		\$1,001 - \$15,000	None		
UTMA-2 ⇒ Hartford Core Equity Fund Class A (HAIAX) [MF]	SP	\$1,001 - \$15,000	None		
UTMA-2 ⇒ ML Bank Deposit Program [BA]	SP	\$1,001 - \$15,000	None		
UTMA-2 ⇒ Washington Mutual Invs Fd Cl A Shs (AWSHX) [MF]	SP	\$15,001 - \$50,000	None		

* 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
Haleakala, Inc.	Salary	\$28,748.29	\$114,993.72
Business Insider	Spouse Freelance	N/A	\$3,700.00
Columbia University	Spouse Freelance	N/A	\$1,000.00
Fortune Media	Spouse Salary	N/A	\$24,312.75
Dow Jones	Spouse Freelance	N/A	\$2,098.00

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Time, Inc.	Spouse Salary	N/A	\$8,200.00
Kyndryl	Spouse Salary	\$86,287.00	N/A
Village of Tarrytown	Salary	\$2,216.00	\$3,800.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of America	August 2025	Credit card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Village of Tarrytown
Executive Committee Member	Hispanic Democrats of Westchester

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">◦ IRA◦ SEP◦ SEP MOD CORE◦ Roth IRA◦ Roth IRA (Owner: SP)◦ IRRA (Owner: SP)◦ CMA (Owner: JT)◦ Equities (Owner: JT)◦ Munis (Owner: JT)◦ UTMA◦ UTMA-2 (Owner: SP)
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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: Effie Phillips-Staley , 09/09/2025