



Filing ID #10070416

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Patrick Thomas Roath
Status: Congressional Candidate
State/District: MA08

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 09/04/2025
Period Covered: 01/01/2024– 08/05/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Barclays – Savings Account [BA]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab - Checking Accounts [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$201 - \$1,000
Iambic, Inc. [OL] LOCATION: New York, NY, US DESCRIPTION: Footwear retailer		\$15,001 - \$50,000	None		
Charles Schwab Brokerage ⇒ Adobe Inc. - Common Stock (ADBE) [ST]	SP	\$1,001 - \$15,000	None		
Charles Schwab Brokerage ⇒ Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Charles Schwab Brokerage ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒	SP	\$100,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$250,000			
Charles Schwab Brokerage ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab Brokerage ⇒ Atlassian Corporation - Class A Common Stock (TEAM) [ST]	SP	\$1,001 - \$15,000	None		
Charles Schwab Brokerage ⇒ Cash Account [BA]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1 - \$200
Charles Schwab Brokerage ⇒ Chewy, Inc. Class A Common Stock (CHWY) [ST]	SP	\$1,001 - \$15,000	None		
Charles Schwab Brokerage ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab Brokerage ⇒ CVS Health Corporation Common Stock (CVS) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	\$50,001 - \$100,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]	SP	\$50,001 - \$100,000	None		
Charles Schwab Brokerage ⇒ Pearson, Plc Common Stock (PSO) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab Brokerage ⇒ Procter & Gamble Company (PG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab Brokerage ⇒ Salesforce, Inc. Common Stock (CRM) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Brokerage ⇒ Schwab Municipal Money Fund - Investor Shares (SWTXX)	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[MF]					
Charles Schwab Brokerage ⇒ Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	None
Charles Schwab Brokerage ⇒ Schwab US Aggregate Bond ETF (SCHZ) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Charles Schwab Brokerage ⇒ Zoom Communications, Inc. - Class A Common Stock (ZM) [ST]	SP	\$1,001 - \$15,000	None		
Charles Schwab Rollover IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ Cash Account [OT] DESCRIPTION: Cash Account	SP	\$50,001 - \$100,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ Fidelity Select Biotechnology Pt (FBIOX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ Fidelity Small Cap Growth Fund (FCPGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ iShares MSCI Global Min Vol Factor ETF (ACWV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ iShares S&P 500 Growth ETF (IVW) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒ MSIF Next Gen Emerging Markets Portfolio - A (MFMPX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Rollover IRA ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Salesforce, Inc. Common Stock (CRM) [ST]					
Charles Schwab Roth IRA ⇒ Cash Account [OT] DESCRIPTION: Cash Account	SP	\$1 - \$1,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Schwab International Equity ETF (SCHF) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Schwab U.S. Large-Cap Growth ETF (SCHG) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab Roth IRA ⇒ Schwab US Aggregate Bond ETF (SCHZ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Brokerage ⇒ Advanced Micro Devices, Inc. (AMD) [ST]		\$15,001 - \$50,000	None		
Chase Brokerage ⇒ Cash Account [OT] DESCRIPTION: Cash account		\$1 - \$1,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
Chase Brokerage ⇒ Chugai Pharmaceutical Ltd Unsponsored ADR (CHGCY) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Chase Brokerage ⇒		\$50,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Extended Market Index Fund (FSMAX) [MF]		\$100,000			
Chase Brokerage ⇒ Fidelity International Index Fund (FSPSX) [MF]		\$50,001 - \$100,000	Dividends	None	\$201 - \$1,000
Chase Brokerage ⇒ Fidelity NASDAQ Composite Index (FNCMX) [MF]		\$100,001 - \$250,000	Dividends	None	\$1,001 - \$2,500
Chase Brokerage ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	None
Chase Brokerage ⇒ iShares Semiconductor ETF (SOXX) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Chase Brokerage ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Chase Brokerage ⇒ Nintendo Co Ltd ADR (NTDOY) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Chase Brokerage ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$50,001 - \$100,000	Dividends	\$1 - \$200	\$1 - \$200
Chase Brokerage ⇒ Reddit, Inc. Class A Common Stock (RDDT) [ST]		\$15,001 - \$50,000	None		
Chase Brokerage ⇒ Roblox Corporation Class A Common Stock (RBLX) [ST]		\$1,001 - \$15,000	None		
Chase Brokerage ⇒ SPDR S&P 500 (SPY) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Chase Brokerage ⇒ Unity Software Inc. Common Stock (U) [ST]		\$1,001 - \$15,000	None		
Chase Brokerage ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Chase Brokerage ⇒ Vanguard Long-Term Treasury ETF (VGLT) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	None
Chase Brokerage ⇒		\$50,001 -	Dividends	\$201 -	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard S&P 500 ETF (VOO) [EF]		\$100,000		\$1,000	
Chase Brokerage ⇒ Vanguard STAR Fund (VGSTX) [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	None
Chase Brokerage ⇒ Xtrackers Semiconductor Select Equity ETF (CHPS) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Chase Roth IRA ⇒ Cash Account [IH]		\$1 - \$1,000	Tax-Deferred		
Chase Roth IRA ⇒ SPDR S&P 500 (SPY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Coinbase ⇒ Ethereum [CT]	SP	\$1,001 - \$15,000	None		
Empower 401k ⇒ BlackRock Equity Index Fund [OT] DESCRIPTION: Collective Investment Trust	SP	\$15,001 - \$50,000	Tax-Deferred		
Empower 401k ⇒ Capital Group 2050 Target Date Retirement Separate Account (Pearson) [OT] DESCRIPTION: Institutional separate account	SP	\$100,001 - \$250,000	Tax-Deferred		
Empower 401k ⇒ Dodge & Cox Balanced Fund - Class X (DOXBX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Empower 401k ⇒ Empower Stable Value Trust (Pearson) [OT] DESCRIPTION: Fixed-income investment fund	SP	\$1,001 - \$15,000	Tax-Deferred		
Empower 401k ⇒ Hotchkis and Wiley Small Cap Value Fund Class I (HWSIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Empower 401k ⇒ JPMorgan Intrepid Growth R5 (JGIRX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Empower 401k ⇒ State Street S&P Midcap Index Securities Lending Class XIV [OT]		\$250,001 - \$500,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Collective Investment Trust					
Empower 401k ⇒ T. Rowe US Mid Cap Growth Equity (IS Pltfrm) (Pearson) [OT]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Institutional separate account					
Fidelity Investments Brokerage ⇒ Cash account [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity Investments Brokerage ⇒ Pearson Unvested Stock Units [RS]	SP	\$50,001 - \$100,000	None		
Fidelity Investments Brokerage ⇒ Pearson, Plc Common Stock (PSO) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000

* 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
Ropes & Gray LLP	Salary	\$242,499.98	\$594,212.98
NCS Pearson Inc.	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

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- Empower 401k
- Empower 401k (Owner: SP)
- Chase Roth IRA
- Chase Brokerage
- Fidelity Investments Brokerage (Owner: SP)
- Charles Schwab Brokerage (Owner: SP)
- Charles Schwab Roth IRA (Owner: SP)
- Charles Schwab Rollover IRA (Owner: SP)
- Coinbase (Owner: SP)
LOCATION: US
DESCRIPTION: Digital Wallet

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 Thomas Roath , 09/04/2025