



Filing ID #10071648

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Peter S Chatzky
Status: Congressional Candidate
State/District: NY17

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 09/22/2025
Period Covered: 01/01/2024– 08/27/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Napa Group, LLC, 90% Interest [OL]		Undetermined	None		
LOCATION: Briarcliff Manor, NY, US					
DESCRIPTION: Principal owner of a privately held software company.					
Napa Venture Partners, LLC, 46% Interest [OL]		Undetermined	None		
LOCATION: Briarcliff Manor, NY, US					
DESCRIPTION: Ownership interest in a privately held partnership.					
Photographs [CO]		\$500,001 - \$1,000,000	None		
Bank accounts ⇒ Chase Bank Accounts [BA]		\$250,001 - \$500,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Bank accounts ⇒ Wells Fargo Bank Accounts [BA]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Jacob Samuel Chatzky 2018 Trust ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Jacob Samuel Chatzky 2018 Trust ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$250,001 - \$500,000	None		
Jacob Samuel Chatzky 2018 Trust ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Jacob Samuel Chatzky 2018 Trust ⇒ MS Capital Appreciation Account [HE]		\$500,001 - \$1,000,000	Dividends, Interest	\$2,501 - \$5,000	\$5,001 - \$15,000
Jacob Samuel Chatzky 2018 Trust ⇒ MS Growth and Income [HE]		\$500,001 - \$1,000,000	Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Jacob Samuel Chatzky 2018 Trust ⇒ MS Growth Opportunity [HE]		\$250,001 - \$500,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Jacob Samuel Chatzky 2018 Trust ⇒ Vanguard Financials ETF (VFH) [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Jacob Samuel Chatzky 2018 Trust ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$500,001 - \$1,000,000	Dividends	None	\$5,001 - \$15,000
Julia Bennett Chatzky 2018 Trust ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Julia Bennett Chatzky 2018 Trust ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$250,001 - \$500,000	None		
Julia Bennett Chatzky 2018 Trust ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Julia Bennett Chatzky 2018 Trust ⇒ MS Capital Appreciation Account [HE]		\$500,001 - \$1,000,000	Dividends, Interest	\$2,501 - \$5,000	\$5,001 - \$15,000
Julia Bennett Chatzky 2018 Trust ⇒ MS Growth and Income [HE]		\$500,001 - \$1,000,000	Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Julia Bennett Chatzky 2018 Trust ⇒ MS Growth Opportunity [HE]		\$250,001 - \$500,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Julia Bennett Chatzky 2018 Trust ⇒ Vanguard Financials ETF (VFH) [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Julia Bennett Chatzky 2018 Trust ⇒		\$500,001 -	Dividends	None	\$5,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard S&P 500 ETF (VOO) [EF]		\$1,000,000			\$15,000
MS Accounts ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$500,001 - \$1,000,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
MS Accounts ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$500,001 - \$1,000,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
MS Accounts ⇒ IRA [HE]		\$100,001 - \$250,000	Dividends, Interest	\$1 - \$200	\$201 - \$1,000
MS Accounts ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$5,000,001 - \$25,000,000	Dividends	\$50,001 - \$100,000	\$50,001 - \$100,000
MS Accounts ⇒ MS Capital Appreciation Account [HE]		\$1,000,001 - \$5,000,000	Dividends, Interest	\$5,001 - \$15,000	\$15,001 - \$50,000
MS Accounts ⇒ MS Growth and Income [HE]		\$1,000,001 - \$5,000,000	Dividends, Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
MS Accounts ⇒ MS Growth Opportunity [HE]		\$1,000,001 - \$5,000,000	Dividends, Interest	\$201 - \$1,000	\$1,001 - \$2,500
MS Accounts ⇒ North Haven [HE]		\$250,001 - \$500,000	None		
Napa Group, LLC 401K ⇒ SSGA S&P 500 Index Fd (SVSPX) [MF]		\$1 - \$1,000	None		
Napa Group, LLC 401K ⇒ State Street Global Equity ex-U.S. Index Fund Class K (SSGLX) [MF]		\$1 - \$1,000	None		
Napa Group, LLC 401K ⇒ State Street Target Retirement 2025 Fund Class I (SSBRX) [MF]		\$100,001 - \$250,000	None		
Napa Group, LLC 401K ⇒ State Street Target Retirement 2030 Fund - Class R3 (SSAJX) [MF]		\$1 - \$1,000	None		
Napa Group, LLC 401K ⇒		\$500,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
T. Rowe Price Blue Chip Growth Fund - I Class (TBCIX) [MF]		\$1,000,000			
Napa Group, LLC 401K ⇒ William Blair Small Cap Value Class R6 (WBVRX) [MF]		\$500,001 - \$1,000,000	None		
Susan Chatzky 2016 Trust ⇒ Paul Robeson Houses Associates L.P., 25% Interest [OT]	SP	Undetermined	None		
DESCRIPTION: Minority interest in a privately held real estate limited partnership.					
Vanguard Accounts ⇒ Vanguard Financials ETF (VFH) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	None
Vanguard Accounts ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Vanguard Accounts ⇒ Vanguard S&P 500 Growth ETF (VOOG) [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	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
Napa Group, LLC	Salary	\$13,500.00	\$47,000.00
Napa Group, LLC	Spouse	\$22,000.00	\$37,583.30
Pilates Loft	Spouse Salary	\$5,400.00	\$1,700.00
Sweat NY	Spouse Salary	N/A	\$4,000.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
CEO	Napa Group, LLC

Position	Name of Organization
Deputy Mayor	Village of Briarcliff Manor
Vice Chairman	Briarcliff Manor Local Development Corporation
Managing Member	Napa Venture Partners, LLC

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- MS Accounts
- Vanguard Accounts
- Bank accounts
LOCATION: US
- Napa Group, LLC 401K
- Jacob Samuel Chatzky 2018 Trust (Owner: SP)
- Julia Bennett Chatzky 2018 Trust (Owner: SP)
- Susan Chatzky 2016 Trust (100% Interest) (Owner: SP)

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: Peter S Chatzky , 09/22/2025