PRELIMINARY INFORMATION – ANSWER <u>EACH</u> OF THESE QUESTIONS IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER <u>EACH</u> OF THESE QUESTIONS 2024 FINANCIAL DISCLOSURE REPORT **UNITED STATES HOUSE OF REPRESENTATIVES** Name: **EXEMPTION** - Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics. 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 that benefits you, your spouse, or dependent child? IPO – Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "Yes" to this question, please contact the Committee on Ethics for further guidance. B. Did you, your spouse, or your dependent children purchase, sell, or exchange any securities or reportable real estate in a **E.** Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing? D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period? reporting period? **C.** Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the A. Did you, your spouse, or your dependent children: transaction exceeding \$1,000 during the reporting period? REPORT TYPE FILER STATUS a. Own any reportable asset that was worth more than \$1,000 at the Receive more than \$200 in unearned income from any reportable end of the reporting period? or asset during the reporting period Elise Marie Stefanik × × 2024 Annual (Due: May 15, 2025) House of Representatives Member of the U.S State: District: Z Yes Yes Yes Yes Yes Daytime Telephon←. × × × \times Amendmen' S O S O 공 중 ö For Use by Members, Officers, and Employees × F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing? any reportable gift(s) totaling more than \$480 in value from a H. Did you, your spouse, or your dependent child receive any ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES" paying you for a speech, appearance, reporting period? Did any individual or organization donate to charity in lieu of paying you for a speech, appearance, or article during the reportable travel or reimbursements for travel totaling more than \$480 in value from a single source during the reporting period? G. Did you, your spouse, or your dependent children receive Employee Officer or **Employing Office** Date of Termination: Termination MC A \$200 penalty shall be assessed against any individual who files more than 30 days late. AND DELIVERED Shared (Office Use Only) Staff Filer Type: (If Applicable) Yes Yes Yes Υes Yes Yes Yes Principal Assistant 중 S 몽 Page 1 of 10 Š 중 S O Š × × $oxed{\times}$ × × × ×

SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Elise Marie Stefanik Page 2 ٩ 10

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	_	<u>ż</u>	m	<u> </u>	+	+-		T	For a detailed discussion of Schedule A requirements please refer to the instructionbooklet.	If you choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent children Ren (DC), or jointly held with anyone (JT), in the optional column on the farteft.	If you report a privately-traded fund that is an Excepted investment Fund, please check the "EIF" box.	Exclude: Your personal residence, including second themes and vacation homes (unless there was rental income during the reporting period); and any infancial interest in, or income derived from, a federal retirement program, including the Thirlt Savings Plan.	For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.	For rental and other real property held for investment, provide a complete address or description, e.g., "rental property," and a city and state.	interest-bearing accounts. If the total is over \$5,000, every financial institution where there is more than \$1,000 in interest-bearing accounts.	For bank and other cash accounts to bath he amount in all	For all IRAs and other retirement plans (such as 401(k) plans) provide the value for each asset held in the account that acceeds the contribut these holds.	Provide complete names of stocks and mutual funds (do not use only ticker symbols).	of income and with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or source of income that generated more than \$200 in "unearned" income during the year.	Identify (a) each asset held for investment or production	>
-Vanguard New York Target Enrollment 2041	NY 529 Account (Asset below)	-Residential Rental Property (Washington, DC)	EMS DC Properties (Asset Below)	Goldman Sachs Marcus Online Savings Acct	Adirondack Trust Checking Acct	ŀ	Example		taited Her to	bose, that of the control of the con	oorte ent Fu	Your Your Your Your Your Your Your Your	wners not po , the r	l and com	Dearin ancial	ando	IAs an	compl se onl	eand nd of le ass in \$20	Y (a) each asset held for investment or prod	
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SCHEDULE A – ASSETS & "UNEARNED INCOME"

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SCHEDULE B – TRANSACTIONS

Name: Elise Marie Stefanik Page 4 of 10

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SCHEDULE C - EARNED INCOME

Name: Elise Marie Stefanik Page 5 of 10

INCOME LIMITS and PROHIBITED INCOME: The 2024 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$31,815. The 2025 limit is \$33,285. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited. **EXCLUDE**: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act. List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totaling \$200 or more during the reporting period. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000. See examples below. **National Shooting Sports Foundation** Examples: State of Maryland Ontario County Board of Education Civil War Roundtable (Oct. 2) Source (include date of receipt for honoraria) Spouse Salary Approved Teaching Fee Legislative Pension Spouse Speech Spouse Satary Type Amount Z \$1,000 \$18,000 \$6,000 Z/A

SCHEDULE D - LIABILITIES

Name: Elise Marie Stefanik Page 6 of 10

or the children, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. *Column K is for liabilities held solely by your spouse or dependent children. Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you rent it out or Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent children. Mark the highest amount owed during the reporting period. are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse

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SCHEDULE E - POSITIONS

consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious social. Institution of the constitution of the Constitu Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or

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SCHEDULE F - AGREEMENTS

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	Elise Marie Stefanik	
	Page 7 of 10	

Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to future employment; a leave of absence during the period of Government service; continuation or deferral of payments by a former or current employer other than the U.S. Government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

				Date	
			(NONE)	Parties to Agreement	
				Terms of Agreement	

SCHEDULE G - GIFTS

Report the source (by name), a brief description, and the value of all gifts totaling more than \$480 received by you, your spouse, or your dependent children from any source during the year. **Exclude:** Gifts from relatives, gifts of personal hospitality from an individual (which may not include a registered lobbyist or foreign agent), local meals, and gifts to a spouse or dependent children that are totally acceptance of gifts except as specifically provided in the rule and some gifts require prior approval of the Committee on Ethics. independent of his or her relationship to you. Gifts with a value of \$192 or less need not be added towards the \$480 disclosure threshold. Note: The gift rule (House Rule 25, clause 5) prohibits

Source	Description	Value
Example: Mr. Joseph Smith, Arlington, VA	Silver Platter (prior determination of personal friendship received from the Committee on Ethics)	\$500
(NONE)		

SCHEDULE H - TRAVEL PAYMENTS and REIMBURSEMENTS

Name: Elise Marie Stefanik
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you and reimbursed by the sponsor. Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$480 received by you, your spouse, or your dependent children during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense. Disclosure is required regardless of whether the expenses were paid directly by the sponsor or were paid by

EXCLUDE: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent children that is totally independent of his or her relationship to the

Source	Date(s)	City of Departure-Dastination-City of Return	Lodging? {Y/N}	Food? (Y/N)	Family Member Included? (Y/N)
Government of China (MECFA)	Aug. 6-11	DC-Beijing, China-DC	٧	γ	2
Examples: Habitat for Humanity (Charity Fundraiser)	Mar. 3-4	DC-Boston-DC	Y	۲	¥
Republican Jewish Coalition	May 17-21	DCTel Aviv, IsraelDC	Υ	Υ	Z

SCHEDULE I – PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

Name:	_	
Elise Marie Stefanik		
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conindential task of charities receiving such payments must be filed directly with the Committee on Ethics,)
Source	Activity	Date	Amount
Examples: Association of American Associations, Washington, DC	Speech	Feb. 2, 2024	\$2,000
(NONE)	Article	Aug. 13, 2024	\$500

Name: Elise Marie Stefanik

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NOTE								
NOTES	The two spouse Schwab IRAs disclosed on the CY23 report were rolled over to the Empower Retirement 401k account.							