



Filing ID #10069103

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Nicholas Joseph Lalota  
**Status:** Member  
**State/District:** NY01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 07/29/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Loomis Sayles Growth Portfolio [HE] DESCRIPTION: Meets definition of EIF and assets are publicly available.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
New York State Employee Retirement System [DB] DESCRIPTION: Defined Benefit plan to be received upon eligibility.		Undetermined	Tax-Deferred		<input type="checkbox"/>
Brighthouse Financial 403(b) ⇒ Fidelity VIP Equity-Income Portfolio [HE] DESCRIPTION: Meets definition of EIF and assets are publicly available.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Brighthouse Financial 403(b) ⇒ Frontier Mid Cap Growth Portfolio Class D [HE] DESCRIPTION: Meets definition of EIF and assets are publicly available.	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Brighthouse Financial 403(b) ⇒ MFS Research International Portfolio [HE] DESCRIPTION: Meets definition of EIF and assets are publicly available.	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Brighthouse Financial 403(b) ⇒ MFS Total Return Portfolio [HE] DESCRIPTION: Meets definition of EIF and assets are publicly available.	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brighthouse Financial 403(b) ⇒ T. Rowe Price Small Cap Growth Portfolio [HE]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Meets definition of EIF and assets are publicly available.					
Brighthouse Financial 403(b) ⇒ Western Asset Management U.S. Government Portfolio [HE]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Meets definition of EIF and assets are publicly available.					
Roth Contributory IRA (Charles Schwab) ⇒ Cash [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Roth Contributory IRA (Charles Schwab) ⇒ SPDR Gold Trust (GLD) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
SUFFOLK COUNTY PUBLIC EMPLOYEES DEFERRED COMPENSATION PLAN ⇒ Retirement I 2045 Fund - I Class (TRPKX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: TRP Retirement 2045 TR-B Assets publicly available					

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SUFFOLK COUNTY PUBLIC EMPLOYEES DEFERRED COMPENSATION PLAN ⇒ Retirement I 2045 Fund - I Class (TRPKX) [MF]		05/07/2025	E	\$15,001 - \$50,000	
DESCRIPTION: NON-DISRECTIONARY EXCHANGE OUT: TRP LATIN AMERICA & TRP RETIREMENT 2045 TR-F NON-DISRECTIONARY EXCHANGE IN: TRP RETIREMENT TR-B					
COMMENTS: This was an automatic and forced transaction without my input or discretion.					

\* 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
US House of Representatives	Member Salary	N/A
Northport-East Northport UFSD	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Navy Federal Credit Union	July 2019	Home Mortgage.	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2015	Suffolk County and me.	Deferred compensation plan investment offered by my former employer, Suffolk County.
September 2010	New York State and me.	Defined benefit plan to be received upon eligibility.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Governing Majority Education Fund	04/07/2024	07/09/2025	New York - New York - New York	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>SUFFOLK COUNTY PUBLIC EMPLOYEES DEFERRED COMPENSATION PLAN</li><li>BrightHouse Financial 403(b) (Owner: SP)</li><li>Roth Contributory IRA (Charles Schwab)</li></ul>
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EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**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:** Hon. Nicholas Joseph Lalota , 07/29/2025