



Filing ID #10059028

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Matt Cartwright
Status: Member
State/District: PA08

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/13/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
"Litigating Business and Commercial Tort Cases" published by Thomson Reuters [IP]		Undetermined	Royalties	\$1,001 - \$2,500	<input type="checkbox"/>
Archer Partners LLC ⇒ People's Security Checking Account [BA]		\$1 - \$1,000	None		<input type="checkbox"/>
Archer Partners LLC ⇒ Piper Archer III Single Prop aircraft [OL] LOCATION: Scranton, PA, US DESCRIPTION: Asset of Archer Partners LLC		\$100,001 - \$250,000	None		<input type="checkbox"/>
B.O.B. Digital Marketing Agency, LLC [OL] LOCATION: Scranton, PA, US DESCRIPTION: New asset acquired in 2021, and filer is voluntarily reporting it. The value is below \$1000 and there were no reportable transactions.	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Blackrock Mid Cap Growth A [MF]	JT	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ Amplify ETF Trust Amplify Mobile Payments ETF (IPAY) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank Sweep account [BA]					
Charles Schwab Investment Account ⇒ First Trust Dorsey Wright International Focus 5 ETF (IFV) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ First Trust RBA American Industrial Renaissance ETF (AIRR) [EF]	JT	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ Global X Uranium ETF (URA) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ Invesco Leisure and Entertainment ETF (PEJ) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ Invesco S&P 500 Equal Weight Technology ETF (RSPT) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ iShares Russell 2000 ETF (IWM) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ Materials Select Sector SPDR (XLB) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ Schwab Treasury Obligations Money Fund - Investor Shares (SNOXX) [MF]	JT	\$50,001 - \$100,000	Dividends	None	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR Gold Trust (GLD) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR S&P Retail ETF (XRT) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ VanEck Gold Miners ETF (GDX) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Columbia Acorn International Fund [MF]		\$250,001 - \$500,000	Dividends	None	<input type="checkbox"/>
Elfun Trusts Funds [MF]		\$250,001 - \$500,000	Capital Gains, Interest	\$15,001 - \$50,000	<input type="checkbox"/>
Hague NY Property Trust [RP] LOCATION: Hague, NY, US		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Merrill Edge Cash/Money Account [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Met Life Whole Life Policy [WU]		\$15,001 - \$50,000	Dividends, Interest	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB Bond Funds - AB Short Duration High Yield Portfolio - Advisor Class (ALHYX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB High Income Adv [MF]	JT	None	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB Large-Cap Growth Adv [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB Select US Long/Short [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley Investment Account ⇒ Allspring Money Market Fund - Premier Class (WMPXX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ American Balanced F2 [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Angel Oak Multi Strat Inc I [MF]	JT	None	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Calamos Phineus Long/Short I [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Catalyst Millburn HGD Strat I [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ ClearBridge International Growth Fund Class I (LMGNX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Balanced Inst [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Credit Suisse Strategic Income [MF]	JT	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Eaton Vance Advantage Floating Rate [MF]	JT	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ ETG - Eaton Vance Tax Advantage Global Dividend [OT] DESCRIPTION: ETF; not in database	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Fidelity Advisor Emerging Markets Fund: Class I (FIMKX) [MF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Fidelity Advisor Real Estate Income Fund: Class I (FRIRX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Fidelity Advisor Small Cap Fund: Class I (FSCIX) [MF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley Investment Account ⇒ Fidelity Advisor Total Bond Fund: Class I (FEPIX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ First Eagle Global [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Franklin Hi Yield Tx Fr Adv [MF]	JT	None	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Franklin Income Adv [MF]	JT	None	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Gabelli Utilities I [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Gateway Fund Y [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Goldman Sachs Inc Builder [MF]	JT	None	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Guggenheim Floating Rt Straight I [MF]	JT	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Guggenheim Macro Opportunities [MF]	JT	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Hartford Balanced Inc [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Hartford Schr US Mdcop Opp I [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Ishares Core S&P Small Cap E [EF]	JT	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Janus Henderson Balanced [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ JP Morgan Hedged Equity [MF]	JT	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ JPMorgan Equity Premium INCO [EF]	SP	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley Investment Account ⇒ JPMorgan Income Builder [MF]	JT	None	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Locorr Macro Strategies I [MF]	JT	None	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Morgan Stanley Bank Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Pimco Income 12 [MF]	JT	None	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Vanguard Health Care ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Vanguard Mid-Cap ETF (VO) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Victory Incore Investment Grade [MF]	JT	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Voya Strategic Income Oppportunity [MF]	JT	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Munley Financing [OL] LOCATION: Scranton, PA, US DESCRIPTION: Ownership interest	SP	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Munley Law PC [OL] LOCATION: Scranton, PA, US DESCRIPTION: Ownership interest	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares 0-5 Year High Yield Corp Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares 0-5 Year High Yield Corp Bond [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares 1-3 Treasury Bond [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Treasury Bond [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 3-7 Year Treasury Bond [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 3-7 Year Treasury Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 7-10 Year Treasury Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Broad USD Invt Grade [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Broad USD Invt Grade [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Core MSCI EAFE [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Core MSCI EAFE [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Core MSCI Emerging Markets [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Core MSCI Emerging Markets [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares IBOXX Invt Grade Corp Bond [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares IBOXX Invt Grade Corp Bond [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares JPM USD Emerging Markets Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Munley Law Profit Sharing Plan ⇒ iShares JPM USD Emerging Markets Bond [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell MidCap [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell MidCap [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Liquid Assets Govt Fund [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Liquid Assets Govt Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corp Bond [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corp Bond [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ US Treasury Note 2/15/2023 [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Nantucket Holding Company [RP] LOCATION: Scranton, PA, US DESCRIPTION: Holding company for 231 and 241 Penn Ave	JT	\$50,001 - \$100,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Penn Avenue Properties [RP] LOCATION: Scranton, PA, US	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
People's Security Bank Accounts [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
PNC Bank Accounts [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
TD Ameritrade Account ⇒ Bristol-Myers Squibb Company (BMY) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TD Ameritrade Account ⇒ General Electric Company (GE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TD Ameritrade Account ⇒ TD Ameritrade Sweep Account [BA]	JT	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
TD Ameritrade Account ⇒ Westinghouse Air Brake Technologies Corporation (WAB)	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
[ST]					
UBS Investment Account ⇒ Ishares Core MSCI EAFE [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
UBS Investment Account ⇒ Pimco Enhanced Short Maturation [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
UBS Investment Account ⇒ UBS Prime Reserves Fund [BA]	JT	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
UBS Investment Account ⇒ UBS Sweep Account [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
UBS Investment Account ⇒ Vanguard Short Term Corporate Bond [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
UBS Investment Account ⇒ Vanguard Total Stock Market [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Investment Account ⇒ Cash Reserve Federal Money Market Fund [MF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Emerging Markets Stock Index [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Investment Account ⇒ Real Estate Index (REIT) [MF]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Treasury Money Market [MF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard Investment Account ⇒ Wellesley Income Fund [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Wayne Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

* 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?
Charles Schwab Investment Account ⇒ Amplify ETF Trust Amplify Mobile Payments ETF (IPAY) [EF]	JT	11/29/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ First Trust Dorsey Wright International Focus 5 ETF (IFV) [EF]	JT	05/19/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ First Trust RBA American Industrial Renaissance ETF (AIRR) [EF]	JT	06/13/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [EF]	JT	06/13/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ Global X Uranium ETF (URA) [EF]	JT	09/13/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ Invesco Leisure and Entertainment ETF (PEJ) [EF]	JT	07/12/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]	JT	04/17/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ Invesco S&P 500 Equal Weight Consumer Staples ETF (RSPS) [EF]	JT	04/14/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ Invesco S&P 500 Equal Weight Consumer Staples ETF (RSPS) [EF]	JT	06/20/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ Invesco S&P 500 Equal Weight Technology ETF (RSPT) [EF]	JT	04/17/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	JT	04/17/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒	JT	07/25/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares 20+ Year Treasury Bond ETF (TLT) [EF]					
Charles Schwab Investment Account ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF]	JT	04/17/2023	P	\$15,001 - \$50,000	
Charles Schwab Investment Account ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF]	JT	09/8/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	JT	04/14/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	JT	09/8/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ iShares MSCI Japan Index Fund (EWJ) [EF]	JT	06/13/2023	P	\$15,001 - \$50,000	
Charles Schwab Investment Account ⇒ iShares MSCI Japan Index Fund (EWJ) [EF]	JT	11/27/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ iShares Russell 2000 ETF (IWM) [EF]	JT	12/18/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ Materials Select Sector SPDR (XLB) [EF]	JT	03/20/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ Materials Select Sector SPDR (XLB) [EF]	JT	05/30/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ Materials Select Sector SPDR (XLB) [EF]	JT	07/25/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ Schwab Treasury Obligations Money Fund - Investor Shares (SNOXX) [MF]	JT	03/17/2023	P	\$100,001 - \$250,000	
Charles Schwab Investment Account ⇒ Schwab Treasury Obligations Money Fund - Investor Shares (SNOXX) [MF]	JT	03/29/2023	P	\$50,001 - \$100,000	
Charles Schwab Investment Account ⇒ Schwab Treasury Obligations Money Fund - Investor Shares (SNOXX) [MF]	JT	03/9/2023	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab Investment Account ⇒ Schwab Treasury Obligations Money Fund - Investor Shares (SNOXX) [MF]	JT	04/12/2023	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ Schwab Treasury Obligations Money Fund - Investor Shares (SNOXX) [MF]	JT	04/14/2023	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ Schwab Treasury Obligations Money Fund - Investor Shares (SNOXX) [MF]	JT	05/18/2023	P	\$50,001 - \$100,000	
Charles Schwab Investment Account ⇒ SPDR Bloomberg High Yield Bond ETF (JNK) [EF]	JT	07/25/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ SPDR Bloomberg High Yield Bond ETF (JNK) [EF]	JT	11/29/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR Gold Trust (GLD) [EF]	JT	03/20/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ SPDR Gold Trust (GLD) [EF]	JT	04/17/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ SPDR Gold Trust (GLD) [EF]	JT	11/29/2023	P	\$15,001 - \$50,000	
Charles Schwab Investment Account ⇒ SPDR S&P Oil & Gas Explor & Product (XOP) [EF]	JT	09/13/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ SPDR S&P Oil & Gas Explor & Product (XOP) [EF]	JT	11/29/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]	JT	12/18/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ SPDR S&P Retail ETF (XRT) [EF]	JT	11/27/2023	P	\$15,001 - \$50,000	
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	JT	03/20/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒	JT	07/25/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]					
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]	JT	03/20/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]	JT	06/13/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	JT	03/20/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	JT	07/25/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ VanEck Gold Miners ETF (GDX) [EF]	JT	08/11/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ VanEck Oil Services ETF (OIH) [EF]	JT	03/20/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ VanEck Oil Services ETF (OIH) [EF]	JT	04/17/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ VanEck Oil Services ETF (OIH) [EF]	JT	05/15/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ VanEck Oil Services ETF (OIH) [EF]	JT	09/13/2023	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ VanEck Oil Services ETF (OIH) [EF]	JT	11/29/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab Investment Account ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	JT	04/17/2023	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ AB Bond Funds - AB Short Duration High Yield Portfolio - Advisor Class (ALHYX) [MF]	JT	08/30/2023	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ AB High Income Fund, Inc. - Advisor Class (AGDYX) [MF]	JT	02/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley Investment Account ⇒ AB Large Cap Growth Fund, Inc. - Advisor Class (APGYX) [MF]	JT	08/30/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB Large Cap Growth Fund, Inc. - Advisor Class (APGYX) [MF]	JT	02/21/2023	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Allspring Money Market Fund - Premier Class (WMPXX) [MF]	JT	08/30/2023	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ Angel Oak Multi-Strategy Income Fd Cl A (ANGLX) [MF]	JT	02/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ ClearBridge International Growth Fund Class I (LMGNX) [MF]	JT	08/30/2023	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Credit Suisse Strategic Income Fd Cl I (CSOIX) [MF]	JT	02/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Eaton Vance Floating Rate & High Income Fund Insti Cl (EIFHX) [MF]	JT	02/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ ETG - Eaton Vance Tax Advantage Global Dividend [OT] LOCATION: US DESCRIPTION: ETF; not in database	JT	08/30/2023	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Fidelity Advisor Emerging Markets Fund: Class I (FIMKX) [MF]	JT	02/21/2023	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Fidelity Advisor Real Estate Income Fund: Class I (FRIRX) [MF]	JT	02/21/2023	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ Fidelity Advisor Small Cap Fund: Class I (FSCIX) [MF]	JT	02/21/2023	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Fidelity Advisor Total Bond Fund: Class I (FEPIX) [MF]	JT	08/30/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley Investment Account ⇒ Franklin High Yield Tax-Free Income Fund Advisor Class (FHYVX) [MF]	JT	08/30/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Franklin Income Fund Advisor Class (FRIAX) [MF]	JT	08/30/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Gateway Fund Class Y (GTEYX) [MF]	JT	02/21/2023	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Goldman Sachs Income Builder Fund Institutional Shares (GSBIX) [MF]	JT	02/21/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Guggenheim Floating Rate Strategies Fund- Institutional Class (GIFIX) [MF]	JT	02/21/2023	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Guggenheim Macro Opportunities Fund- Institutional Class (GIOIX) [MF]	JT	08/30/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	JT	08/30/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Janus Henderson Balanced Fund - I Shares (JBALX) [MF]	JT	02/21/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ JPMorgan Hedged Equity Fund I Class (JHEQX) [MF]	JT	02/21/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ JPMorgan Income Builder Fund I Class (JNBSX) [MF]	JT	08/30/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ LoCorr Macro Strategies Fund - Class I (LFMIX) [MF]	JT	02/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]	JT	02/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ The Gabelli Utilities Fd Cl I (GAUIX) [MF]	JT	02/21/2023	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒	JT	08/20/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Health Care ETF (VHT) [EF]					
Morgan Stanley Investment Account ⇒ Vanguard Mid-Cap ETF (VO) [EF]	JT	08/30/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Vanguard Mid-Cap ETF (VO) [EF]	JT	02/21/2023	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Victory Investment Grade Convertible Fund - Class I (VICIX) [MF]	JT	02/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Voya Strategic Income Opportunities Fund - Class I (IISIX) [MF]	JT	02/21/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corporate Bond ETF (SHYG) [EF]		11/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corporate Bond ETF (SHYG) [EF]		08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corporate Bond ETF (SHYG) [EF]	SP	08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corporate Bond ETF (SHYG) [EF]		02/24/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF]		11/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF]		10/12/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF]		08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF]		02/24/2023	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF]	SP	10/12/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF]	SP	08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		02/24/2023	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	SP	10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	SP	08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF]		08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF]		02/24/2023	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF]	SP	08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [EF]		11/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [EF]		10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [EF]		08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [EF]		10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [EF]	SP	08/30/2023	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Munley Law Profit Sharing Plan ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [EF]		02/16/2023	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		02/24/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [EF]		08/30/2023	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [EF]		02/24/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [EF]	SP	10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]		11/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]		10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]		08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]	SP	10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]	SP	08/30/2024	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [EF]		02/24/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]		11/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]		08/30/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]		02/24/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	10/12/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	08/30/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value ETF (IWD) [EF]		11/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value ETF (IWD) [EF]		10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value ETF (IWD) [EF]		02/24/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 ETF (IWM) [EF]	SP	10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 ETF (IWM) [EF]	SP	08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]		02/24/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]	SP	10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]	SP	08/30/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corporate Bond ETF (SPSB) [EF]		11/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]		10/27/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]		08/31/2023	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]	SP	10/27/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]	SP	10/12/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]	SP	08/31/2023	P	\$50,001 - \$100,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]		11/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]		02/24/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]	SP	10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]	SP	08/30/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	10/12/2023	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	08/30/2023	P	\$1,001 - \$15,000	
UBS Investment Account ⇒ UBS Prime Reserves Fund [BA]	JT	01/11/2023	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Investment Account ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	JT	03/23/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	JT	06/28/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	JT	09/27/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	JT	12/19/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard Emerging Markets Stock Index Fund Admiral Shares (VEMAX) [MF]	JT	06/16/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard Emerging Markets Stock Index Fund Admiral Shares (VEMAX) [MF]	JT	09/15/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard Emerging Markets Stock Index Fund Admiral Shares (VEMAX) [MF]	JT	12/15/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard Value Index Fd Admiral Shs (VVIAX) [MF]	JT	03/22/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard Value Index Fd Admiral Shs (VVIAX) [MF]	JT	06/22/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard Value Index Fd Admiral Shs (VVIAX) [MF]	JT	09/20/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard Value Index Fd Admiral Shs (VVIAX) [MF]	JT	12/20/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard Wellesley Income Fund Admiral Shares (VWIAX) [MF]	JT	03/17/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard Wellesley Income Fund Admiral Shares (VWIAX) [MF]	JT	06/15/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Investment Account ⇒ Vanguard Wellesley Income Fund Admiral Shares (VWIAX) [MF]	JT	09/15/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Vanguard Wellesley Income Fund Admiral Shares (VWIAX) [MF]	JT	12/18/2023	P	\$1,001 - \$15,000	

* 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
Munley Law	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	People's Security Bank	2023 periodic	Law firm lines of credit	\$1,000,001 - \$5,000,000
JT	People's Security Bank	March 2008	Mortgage on office property 241 Penn Ave	\$250,001 - \$500,000
JT	People's Security Bank	1998	Mortgage on personal residence	\$15,001 - \$50,000
JT	People's Security Bank	September 2020	Home Equity loan	\$15,001 - \$50,000
JT	American Express	December 2023	Revolving credit card	\$15,001 - \$50,000
	People's Security Bank	December 2017	Mortgage on office property 231 Penn Ave	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee (uncompensated)	Hague Personal Residence Trust
Officer (uncompensated)	Archer Partners LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2012	Munley Law Firm and filer	Continued participation in profit sharing plan (no new contributions, investment income reinvestment only)

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Archer Partners LLC
LOCATION: US
- Charles Schwab Investment Account (Owner: JT)
- Morgan Stanley Investment Account (Owner: JT)
LOCATION: US
- Munley Law Profit Sharing Plan
- Munley Law Profit Sharing Plan (Owner: SP)
- TD Ameritrade Account (Owner: JT)
LOCATION: US
- UBS Investment Account (Owner: SP)
LOCATION: US
- Vanguard Investment Account (Owner: JT)
LOCATION: US

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

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☒ 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. Matt Cartwright , 08/13/2024