



Filing ID #10007296

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Michael Gallagher
Status: Congressional Candidate
State/District: NY13

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2015
Filing Date: 08/27/2015

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Checking Account	JT	\$100,001 - \$250,000	None		
DESCRIPTION: Checking Account					
LS 401K ⇒ American Funds 2030 Target Date Retirement Fund® Class R-6	SP	\$50,001 - \$100,000	None		
DESCRIPTION: American Funds 2030 Target Date Retirement Fund® Class R-6					
LS 401K ⇒ American Funds 2035 Target Date Retirement Fund® Class R-6	SP	\$1,001 - \$15,000	None		
DESCRIPTION: American Funds 2035 Target Date Retirement Fund® Class R-6					
LS 401K ⇒ MFS® Value Fund Class R5	SP	\$15,001 - \$50,000	None		
DESCRIPTION: MFS® Value Fund Class R5					
LS 401K ⇒ News Corp Stable Value Fund	SP	\$15,001 - \$50,000	None		
DESCRIPTION: News Corp Stable Value Fund					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LS 401K ⇒ Rollover IRA Cash Available	SP	\$50,001 - \$100,000	None		
DESCRIPTION: Cash available and uninvested from previous job 401(k)					
LS 401K ⇒ Spartan U.S. Bond Index Fund - Institutional Class	SP	\$100,001 - \$250,000	Capital Gains	None	None
DESCRIPTION: Spartan® U.S. Bond Index Fund - Institutional Class					
LS IRA Account ⇒ Vanguard Balanced Index Fund Investor Shares	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Vanguard Balanced Index Fund Investor Shares					
LS IRA Account ⇒ Vanguard Extended Market Index Fund Admiral Shares	SP	\$15,001 - \$50,000	None		
DESCRIPTION: Vanguard Extended Market Index Fund Admiral Shares					
MG IRA Account ⇒ Vanguard Equity Income Fund Investor Shares		\$1,001 - \$15,000	None		
DESCRIPTION: Vanguard Equity Income Fund Investor Shares					
MG IRA Account ⇒ Vanguard Growth and Income Fund Investor Shares		\$1,001 - \$15,000	None		
DESCRIPTION: Vanguard Growth and Income Fund Investor Shares					
NY 529 ⇒ Catherine Gallagher	SP	\$15,001 - \$50,000	None		
LOCATION: NY DESCRIPTION: Beneficiary is Catherine Gallagher. Growth Portfolio= Vanguard Institutional Total Stock Market Index Fund 52.5% Vanguard Total International Stock Index Fund 22.5% Vanguard Total Bond Market II Index Fund 20% Vanguard Total International Bond Index Fund 5%					
NY 529 ⇒ John Gallagher	SP	\$15,001 - \$50,000	None		
LOCATION: NY DESCRIPTION: Beneficiary is John Gallagher. Moderate Growth Portfolio= Vanguard Institutional Total Stock Market Index Fund 35% Vanguard Total International Stock Index Fund 15% Vanguard Total Bond Market II Index Fund 40% Vanguard Total International Bond Index Fund 10% Inflation Protected Securities Portfolio= anguard® Inflation-Protected Securities Fund,					
NY 529 ⇒ Michael Gallagher, Jr.	SP	\$15,001 - \$50,000	None		
LOCATION: NY DESCRIPTION: Account Beneficiary Michael Gallagher, Jr. Aggressive Age Based Option = The Income Portfolio invests in three Vanguard® bond index funds and one Vanguard short-term reserves account in approximately the following proportions: Vanguard Total Bond Market II Index					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fund 42% Vanguard Total International Bond Index Fund 15% Vanguard Short-Term Inflation-Protected Securities Index Fund 18% Vanguard Short-Term Reserves Account 25% Moderate Age Based Option = Vanguard Total Bond Market II In					
NY 529 ⇒ Thomas Gallagher	SP	\$15,001 - \$50,000	None		
LOCATION: NY DESCRIPTION: Beneficiary is Thomas Gallagher. Moderate Growth Portfolio= Vanguard Institutional Total Stock Market Index Fund 35% Vanguard Total International Stock Index Fund 15% Vanguard Total Bond Market II Index Fund 40% Vanguard Total International Bond Index Fund 10% Inflation Protected Securities Portfolio= Vanguard® Inflation-Protected Securities Fund,					
Savings Account	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Vanguard Dividend Appreciation Index Fund Admiral Shares	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Vanguard Dividend Appreciation Index Fund Admiral Shares					
Vanguard LifeStrategy Growth Fund	SP	\$15,001 - \$50,000	None		
DESCRIPTION: Vanguard LifeStrategy Growth Fund					

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
News Corporation	Spouse salary	\$450,000	\$617,000

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Home Mortgage	December 2004	Mortgage for primary Residence	\$250,001 - \$500,000

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 ASSET CLASS DETAILS

- LS 401K (Owner: SP)
DESCRIPTION: Fidelity Account for Liate Stehlik
- LS IRA Account (Owner: SP)
DESCRIPTION: Liate Stehlik IRA
- MG IRA Account
DESCRIPTION: Michael Gallagher IRA Accounts
- NY 529 (Owner: SP)
LOCATION: NY

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: Michael Gallagher , 08/27/2015