



Filing ID #10001083

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Mr. Patrick T. McHenry  
**Status:** Member  
**State/District:** NC10

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2013  
**Filing Date:** 05/14/2014

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset        | Income Type(s) | Income             | Tx. > \$1,000?                      |
|--|-------|-----------------------|----------------|--------------------|-------------------------------------|
| 806 Requa Rd.<br><br>LOCATION: Cherryville, NC, US   |       | \$100,001 - \$250,000 | Rent           | \$5,001 - \$15,000 | <input type="checkbox"/>            |
| Alliance Bank and Trust<br><br>DESCRIPTION: over the counter stock, available to public but not on an exchange |       | \$1 - \$1,000         | None           |                    | <input type="checkbox"/>            |
| Brattle Group Retirement Plan ⇒<br>Vanguard Prime Money Market Fund  | SP    | \$15,001 - \$50,000   | Tax-Deferred   | Not Applicable     | <input type="checkbox"/>            |
| Brattle Group Retirement Plan ⇒<br>Vanguard Target Retirement 2045   | SP    | \$15,001 - \$50,000   | Tax-Deferred   | Not Applicable     | <input checked="" type="checkbox"/> |
| Brattle Group Retirement Plan ⇒<br>Vanguard Total Bond Mkt Index Inv   | SP    | \$15,001 - \$50,000   | Tax-Deferred   | Not Applicable     | <input type="checkbox"/>            |
| Congressional FCU checking   |       | \$15,001 - \$50,000   | None           |                    | <input type="checkbox"/>            |
| Congressional FCU money market account   |       | \$50,001 - \$100,000  | Interest       | \$1 - \$200        | <input type="checkbox"/>            |

| Asset  | Owner | Value of Asset        | Income Type(s) | Income              | Tx. > \$1,000?           |
|--|-------|-----------------------|----------------|---------------------|--------------------------|
| GW & Wade Asset Managment ⇒ Prime Fund Daily Money Class | SP    | \$1,001 - \$15,000    | Tax-Deferred   | Not Applicable      | <input type="checkbox"/> |
| Locust-Hwy 200 LLC                                       |       | \$15,001 - \$50,000   | None           |                     | <input type="checkbox"/> |
| LOCATION: Locust, NC, US                                 |       |                       |                |                     |                          |
| Marsh & McLennan Companies, Inc. (MMC)                   | SP    | \$1,001 - \$15,000    | Dividends      | \$1 - \$200         | <input type="checkbox"/> |
| McHenry-McHenry partnership ⇒ 215 Robinson Rd.           |       | \$100,001 - \$250,000 | Rent           | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Gastonia, NC, US                               |       |                       |                |                     |                          |
| McHenry-Putman Partnership ⇒ 109 W. 8th Ave.             |       | \$15,001 - \$50,000   | Rent           | \$5,001 - \$15,000  | <input type="checkbox"/> |
| LOCATION: Gastonia, NC, US                               |       |                       |                |                     |                          |
| McHenry-Putman Partnership ⇒ 5224 Union Rd.              |       | \$15,001 - \$50,000   | Rent           | \$5,001 - \$15,000  | <input type="checkbox"/> |
| LOCATION: Gastonia, NC, US                               |       |                       |                |                     |                          |
| SCANA Corporation (SCG)                                  |       | \$15,001 - \$50,000   | Dividends      | \$1,001 - \$2,500   | <input type="checkbox"/> |

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

SCHEDULE B: TRANSACTIONS

| Asset   | Owner | Date      | Tx. Type | Amount             | Cap. Gains > \$200? |
|---|-------|-----------|----------|--------------------|---------------------|
| Brattle Group Retirement Plan ⇒ Vanguard Target Retirement 2045 | SP    | Monthly   | P        | \$1,001 - \$15,000 |                     |
| DESCRIPTION: Monthly through July 30                            |       |           |          |                    |                     |
| Brattle Group Retirement Plan ⇒ Vanguard Target Retirement 2045 | SP    | 06/4/2013 | P        | \$1,001 - \$15,000 |                     |
| Brattle Group Retirement Plan ⇒ Vanguard Target Retirement 2045 | SP    | 08/7/2013 | P        | \$1,001 - \$15,000 |                     |

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

SCHEDULE C: EARNED INCOME

| Source            | Type          | Amount |
|-------------------|---------------|--------|
| The Brattle Group | spouse salary | N/A    |

**SCHEDULE D: LIABILITIES**

| Owner | Creditor                    | Date Incurred  | Type  | Amount of Liability   |
|-------|-----------------------------|----------------|---|-----------------------|
|       | Mr. and Mrs. George LeCroy  | March 2003     | Mortgage on 215 Robinson Rd., Gastonia NC     | \$50,001 - \$100,000  |
|       | Bank of America             | January 2010   | Mortgage on 806 Requa Rd., Cherryville NC     | \$50,001 - \$100,000  |
| SP    | Homeward Residential        | September 2012 | mortgage on personal residence, Washington DC | \$250,001 - \$500,000 |
|       | First Federal of Charleston | May 2012       | mortgage on personal residence, Denver NC     | \$250,001 - \$500,000 |

**SCHEDULE E: POSITIONS**

| Position            | Name of Organization        |
|---------------------|-----------------------------|
| Partner             | McHenry-McHenry partnership |
| Partner             | McHenry-Putman partnership  |
| sole proprietor     | McHenry Real Estate         |
| COMMENTS: no assets |                             |

**SCHEDULE F: AGREEMENTS**

None disclosed.

**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 ASSET CLASS DETAILS**

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- Brattle Group Retirement Plan (Owner: SP)
- GW & Wade Asset Managment (Owner: SP)
- McHenry-McHenry partnership (50% Interest)  
LOCATION: US
- McHenry-Putman Partnership (10% Interest)  
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

## COMMENTS

## 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:** Mr. Patrick T. McHenry , 05/14/2014