



Filing ID #10012373

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2016  
**Filing Date:** 05/16/2016

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
900 W. 190th St.  LOCATION: New York, NY, US	JT	\$500,001 - \$1,000,000	None		
Checking Account  DESCRIPTION: Checking Account	JT	\$100,001 - \$250,000	None		
LS 401K ⇒ American Funds 2030 Target Date Retirement Fund® Class R-6  DESCRIPTION: American Funds 2030 Target Date Retirement Fund® Class R-6	SP	\$50,001 - \$100,000	None		
LS 401K ⇒ American Funds 2035 Target Date Retirement Fund® Class R-6  DESCRIPTION: American Funds 2035 Target Date Retirement Fund® Class R-6	SP	\$1,001 - \$15,000	None		
LS 401K ⇒ MFS® Value Fund Class R5  DESCRIPTION: MFS® Value Fund Class R5	SP	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LS 401K ⇒ News Corp Stable Value Fund	SP	\$15,001 - \$50,000	None		
DESCRIPTION: News Corp Stable Value Fund					
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					
Matthew Gallagher Debt to Michael Gallagher		\$1,001 - \$15,000	None		
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	\$50,001 - \$100,000	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,					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
NY 529 ⇒ Michael Gallagher, Jr.	SP	\$50,001 - \$100,000	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 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	\$50,001 - \$100,000	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,					
Rare Books		\$1,001 - \$15,000	None		
DESCRIPTION: Rare book collection.					
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
Harper Collins	Spouse Salary	N/A	N/A

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 , 05/16/2016