



Filing ID #10003958

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2013  
**Filing Date:** 08/6/2014

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

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

Trip Details				Inclusions		
Source	Start Date	End Date	Itinerary	Lodging?	Food?	Family?
Heritage Foundation	02/6/2013	02/8/2013	Washington DC - Baltimore MD - Washington, DC	<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 ASSET CLASS DETAILS

- 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 , 08/6/2014