



Filing ID #10060442

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Josh McConkey
Status: Congressional Candidate
State/District: NC13

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 08/24/2024
Period Covered: 01/01/2023– 07/14/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank Account [BA]		\$15,001 - \$50,000	None		
Bank Account [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Bank Account [BA]		\$15,001 - \$50,000	None		
Bank Account [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$201 - \$1,000
College Tuition Plan ⇒ College Tuition Plan [5P]		\$15,001 - \$50,000	None		
LOCATION: FL					
College Tuition Plan ⇒ College Tuition Plan [5P]		\$15,001 - \$50,000	None		
LOCATION: FL					
College Tuition Plan ⇒ College Tuition Plan [5P]		\$15,001 - \$50,000	None		
LOCATION: FL					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Cryptocurrency ⇒ ETH [OT] DESCRIPTION: Cryptocurrency		\$1,001 - \$15,000	None		
Cryptocurrency ⇒ UniCoin [OT] DESCRIPTION: Cryptocurrency		\$1,001 - \$15,000	None		
Home [RP] LOCATION: Adelaide, AU	JT	\$1,000,001 - \$5,000,000	None		
Individual 401k (Elsa) ⇒ IWF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Individual 401k (Elsa) ⇒ VFIAX [MF]		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (Elsa) ⇒ VOO [EF]		\$1,001 - \$15,000	Tax-Deferred		
Individual 401k (FLP) ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (FLP) ⇒ CrowdStrike Holdings, Inc. - Class A Common Stock (CRWD) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (FLP) ⇒ IVV [EF]		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (FLP) ⇒ IWF [EF]		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (FLP) ⇒ VFIAX [MF]		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (MEP) ⇒ American Express Company (AXP) [ST]		\$100,001 - \$250,000	Tax-Deferred		
Individual 401k (MEP) ⇒ Apple Inc. (AAPL) [ST]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Individual 401k (MEP) ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$100,001 - \$250,000	Tax-Deferred		
Individual 401k (MEP) ⇒ GLD [EF]		\$1,001 - \$15,000	Tax-Deferred		
Individual 401k (MEP) ⇒ IWF [EF]		\$50,001 - \$100,000	Tax-Deferred		
Individual 401k (MEP) ⇒ Palo Alto Networks, Inc. (PANW) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (MEP) ⇒ VFIAX [MF]		\$50,001 - \$100,000	Tax-Deferred		
Individual 401k (MEP) ⇒ VOO [EF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ IWF [EF]		\$50,001 - \$100,000	Tax-Deferred		
IRA ⇒ VYM [EF]		\$1,001 - \$15,000	Tax-Deferred		
Kiwisaver ⇒ Kiwisaver [OT] DESCRIPTION: Kiwisaver		\$1,001 - \$15,000	None		
Koru Emergency Physicians PLLC [OL] LOCATION: Georgetown, TX, US DESCRIPTION: Professional Limited Liability Company	JT	\$50,001 - \$100,000	Services	\$15,001 - \$50,000	\$50,001 - \$100,000
ROLLOVER IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$15,001 - \$50,000	Tax-Deferred		
ROLLOVER IRA ⇒ FREL [EF]		\$1,001 - \$15,000	Tax-Deferred		
ROLLOVER IRA ⇒ HDV [EF]		\$15,001 - \$50,000	Tax-Deferred		
ROLLOVER IRA ⇒ IAU [EF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ROLLOVER IRA ⇒ VOO [EF]		\$15,001 - \$50,000	Tax-Deferred		
ROLLOVER IRA ⇒ VYM [EF]		\$15,001 - \$50,000	Tax-Deferred		
ROLLOVER IRA- ELSA ⇒ VYM [EF]		\$15,001 - \$50,000	Tax-Deferred		
Stocks, ETF, Mutual Funds ⇒ EMLC [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ FNDA [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ FNDX [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Stocks, ETF, Mutual Funds ⇒ HAUZ [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ IAU [EF]		\$1,001 - \$15,000	None		
Stocks, ETF, Mutual Funds ⇒ IEMG [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ MUB [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Stocks, ETF, Mutual Funds ⇒ PDN [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ PRFZ [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ PXF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ PXH [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Stocks, ETF, Mutual Funds ⇒ SCHA [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ SCHF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Stocks, ETF, Mutual Funds ⇒ SCHH [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ SCHP [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Stocks, ETF, Mutual Funds ⇒ SCHX [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ VB [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ VSS [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Superannuation ⇒ Superannuation [OT] DESCRIPTION: SA Superannuation		\$15,001 - \$50,000	None		

* 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 Current Year to Filing	Amount Preceding Year
NC Education Lottery	Lottery Win	\$757,000.00	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Movement Mortgage	June 2021	Home Mortgage	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Commander	US Air Force Reserves
Emergency Physician	Koru Emergency Physicians, PLLC

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- College Tuition Plan
LOCATION: FL
- Cryptocurrency
LOCATION: US
- Individual 401k (Elsa)
- Individual 401k (FLP)
- Individual 401k (MEP)
- IRA
- Kiwisaver
LOCATION: US
- ROLLOVER IRA
- ROLLOVER IRA- ELSA
- Stocks, ETF, Mutual Funds
LOCATION: US
- Superannuation
LOCATION: US

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: Josh McConkey , 08/24/2024