



Filing ID #10051864

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Claudia Tenney  
**Status:** Member  
**State/District:** NY24

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2021  
**Filing Date:** 04/11/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Adirondeck Financial Services Invest Acct ⇒ Dodge & Cox Income Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Dodge and Cox International Fund (MF) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Dreyfus Ins Deposit Program [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Europacific Gwth Fd Cl-F-2 (MF) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ IShares TR Russell 2000ETF (EF) [BA]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ IShares TR Russell Mid-Cap ETF (EF) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Metropolitan West Ttl Ret Bd Fund CL 1 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Metropolitan West Unconstrained BdFd (MF) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Adirondeck Financial Services Invest Acct ⇒ MFS Growth Fund CL 1 (MF) [MF]		\$15,001 - \$50,000	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ OakMark Fund Investor Class Fund (MF) [BA]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ SPDR Gold Tr Gold Shs [EF]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Vaneck Vectors ETF Tr Gold MIners [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Vanguard Index FDS S & P 500 ETF Shs (EF) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Vanguard S-T Investment Grade Fd (MF) [BA]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Bank of Utica BA [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ American Funds Europacific (EF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ American Funds Growth Fund (EF) [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ BMO Small-Cap Value Fund (EF) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ Prudential High Yield Fund (EF) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ Vanguard 500 Idx Fund Adm [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ Vanguard Mid-Cap Index Fund Adm (EF) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ Voya Intermediate Bond Fund (EF) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒		\$1,001 - \$15,000	Capital Gains,	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Clearbridge Apprec. C (MF) [BA]			Dividends		<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Clearbridge Appreciation A (EF) [BA]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Morgan Stanley Bank NA (BA) [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Berkshire Hathaway CL B New (MF) [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge Aggressive Growth Fd (EF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge Appreciation A (EF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge International Value A (EF) [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge Value Trust A (EF) [BA]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>

\* Asset class 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Adirondeck Financial Services Invest Acct ⇒ Dodge & Cox International Fund [MF]		01/19/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Global X Fds X Silver [MF]		12/6/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Ishares Tr Russell 2000 [MF]		01/19/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Ishares Tr Russell M [MF]		11/30/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒		11/30/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
MFS Growth Fund Class [MF]					
Adirondeck Financial Services Invest Acct ⇒ Oakmark Fund Investor [MF]		11/30/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ SPDR Gold Tr Shares [MF]		12/6/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ SPDR Gold Trust (GLD) [MF]		05/20/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Vaneck ETF Gold Miners [MF]		12/6/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ VanEck Vectors ETF [MF]		05/20/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Adirondeck Financial Services Invest Acct ⇒ Vanguard Index Fds S&P 500 [MF]		07/8/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

\* Asset class 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
OMP Park	Wages	\$6,000.00
Mid York Press	Wages	\$25,579.00
US House of Representatives	Wages	\$154,997.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Key Bank, NA	April 2013	Home Mortgage	\$50,001 - \$100,000
	Community Bank	2017	Auto Loan	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

None disclosed.

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	Days at Own Exp.	Lodging?	Food?	Family?
United States Qatar Business Council	10/10/2021	10/16/2021	Syracuse (SYR) - Doha (DOH) - Syracuse (SYR)	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Association of Marshall Scholars	11/19/2021	11/23/2021	Washington, D.C. (IAD) - London (LHR) - Washington, D.C. (IAD)	0	<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

<ul style="list-style-type: none"><li>Adirondeck Financial Services Invest Acct LOCATION: US DESCRIPTION: Adirondeck Financial Investment Acct</li><li>Mid_York Press Inc. 401K account</li><li>Morgan Stanley Investment Acct LOCATION: US</li><li>Morgan Stanley Trad. IRA DESCRIPTION: Morgan Stanley Traditional IRA</li></ul>
--

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

## **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:** Hon. Claudia Tenney , 04/11/2023