



Filing ID #10059167

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Robert W. Mercuri  
**Status:** Congressional Candidate  
**State/District:** PA17

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 05/15/2024  
**Period Covered:** 01/01/2023– 04/15/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Account ⇒ Fidelity Contra Fund (FCNTX) [MF]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Fidelity Account ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity Account ⇒ GE Aerospace Common Stock (GE) [ST]	JT	\$1 - \$1,000	None		
Fidelity Account ⇒ GRAYSCALE ETHRM TR ETH (ETHE) [ST]	JT	\$1 - \$1,000	None		
Fidelity IRA ⇒ Fidelity Contra Fund (FCNTX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Rollover IRA ⇒ Fidelity Contra Fund (FCNTX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Rollover IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Contra Fund (FCNTX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Contra Fund (FCNTX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Select Gold Pt (FSAGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Select Gold Pt (FSAGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ GE Aerospace Common Stock (GE) [ST]		\$1 - \$1,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Grayscale Bitcoin Trust (GBTC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ HSBC Bank Account [BA]	SP	\$1 - \$1,000	None		
Fidelity Roth IRA ⇒ iShares Core Dividend Growth ETF (DGRO) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ iShares Russell 3000 ETF (IWF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ iShares Russell 3000 ETF (IWF) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ US Bank Account [BA]		\$1,001 - \$15,000	None		
Fidelity Roth IRA ⇒ Victory Cornerstone Aggressive Fund (UCAGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Victory Cornerstone Aggressive Fund (UCAGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Fidelity UTMA Account (DM) ⇒ Fidelity Contra Fund (FCNTX) [MF]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Fidelity UTMA Account (DM) ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity UTMA Account (DM) ⇒ GE Aerospace Common Stock (GE) [ST]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	None
Fidelity UTMA Account (DM) ⇒ Grayscale Bitcoin Trust (GBTC) [EF]	DC	\$1 - \$1,000	None		
Fidelity UTMA Account (DM) ⇒ iShares Russell 3000 ETF (IWF) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity UTMA Account (DM) ⇒ Victory Cornerstone Aggressive Fund (UCAGX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity UTMA Account (KM) ⇒ Fidelity Contra Fund (FCNTX) [MF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Fidelity UTMA Account (KM) ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity UTMA Account (KM) ⇒ Grayscale Bitcoin Trust (GBTC) [EF]	DC	\$1,001 - \$15,000	None		
Fidelity UTMA Account (KM) ⇒ iShares Russell 3000 ETF (IWF) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity UTMA Account (KM) ⇒ Victory Cornerstone Aggressive Fund (UCAGX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity UTMA Account (MM) ⇒ Fidelity Contra Fund (FCNTX) [MF]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
Fidelity UTMA Account (MM) ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity UTMA Account (MM) ⇒ GE Aerospace Common Stock (GE) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity UTMA Account (MM) ⇒ GE HealthCare Technologies Inc. - Common Stock (GEHC) [ST]	DC	\$1 - \$1,000	None		
Fidelity UTMA Account (MM) ⇒ GE Vernova Inc. Common Stock (GEV) [ST]	DC	\$1 - \$1,000	Capital Gains	\$1 - \$200	None
Fidelity UTMA Account (MM) ⇒ Grayscale Bitcoin Trust (GBTC) [EF]	DC	\$1,001 - \$15,000	None		
Fidelity UTMA Account (MM) ⇒ iShares Russell 3000 ETF (IWF) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity UTMA Account (MM) ⇒ Victory Cornerstone Aggressive Fund (UCAGX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Hivers & Strivers VC Fund, L.P. [HE]		\$15,001 - \$50,000	Capital Gains, Interest	\$1 - \$200	\$201 - \$1,000
Marcus by Goldman Sachs [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Pennsylvania State Employee Retirement System [PE]		\$15,001 - \$50,000	None		
Pennsylvania State Employee Retirement System Defined Contribution Plan ⇒ T. Rowe Price 2050 Retirement Fund (TRRMRX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
PNC Bank [BA]		\$1,001 - \$15,000	None		
PNC Bank Pension [PE]		\$15,001 - \$50,000	None		
PNC HSA ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Quicksilver Capital, LLC, 100% Interest [OL]	JT	\$500,001 - \$1,000,000	K-1 Income	\$15,001 - \$50,000	\$50,001 - \$100,000
LOCATION: Allegheny, PA, US DESCRIPTION: 100% (candidate/spouse) ownership in an S Corporation					
U.S. Savings Bonds [GS]	DC	\$1,001 - \$15,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
USAA 529 Education Savings Plan [5P] LOCATION: PA	DC	\$50,001 - \$100,000	Tax-Deferred		
USAA 529 Education Savings Plan [5P] LOCATION: PA	DC	\$50,001 - \$100,000	Tax-Deferred		
USAA 529 Education Savings Plan [5P] LOCATION: PA	DC	\$50,001 - \$100,000	Tax-Deferred		
USAA Annuity [FN]	SP	\$1,001 - \$15,000	None		
USAA Federal Savings Bank [BA]		\$1,001 - \$15,000	None		
Victory Funds Account ⇒ Victory Cornerstone Conservative Fund (USCCX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

\* 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

<b>Source</b>	<b>Type</b>	<b>Amount Current Year to Filing</b>	<b>Amount Preceding Year</b>
PA House of Representatives	Salary	\$31,039.75	\$102,206.88
Quicksilver Capital, LLC	Spouse Salary	N/A	N/A

## SCHEDULE D: LIABILITIES

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
JT	ApplePie Capital	September 2023	Business Loan	\$250,001 - \$500,000
JT	SBA	prior years	Small Bus. Association Loan	\$15,001 - \$50,000
JT	Cadence Bank	Prior Years	Business Loan	\$100,001 - \$250,000

COMMENTS: Paid off--September 2023

## SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Regional Learning Alliance
President & Treasurer	Quicksilver Capital, LLC
Trustee	Point Park University

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2013	Myself and PNC Bank	Pension agreement
January 2021	Myself and the PA House of Representatives	State pension plan

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

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- Fidelity Account (Owner: JT)
- Fidelity IRA
- Fidelity Rollover IRA (Owner: SP)
- Fidelity Roth IRA
- Fidelity Roth IRA (Owner: SP)
- Fidelity UTMA Account (DM) (Owner: DC)
- Fidelity UTMA Account (KM) (Owner: DC)
- Fidelity UTMA Account (MM) (Owner: DC)
- Pennsylvania State Employee Retirement System Defined Contribution Plan
- PNC HSA  
LOCATION: US
- Victory Funds Account (Owner: JT)

## 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:** Robert W. Mercuri , 05/15/2024