



Filing ID #10061186

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2022
Filing Date: 05/14/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alliance Bank and Trust [PS] DESCRIPTION: Stock in NC bank; available for public purchase but not publicly traded		\$1 - \$1,000	None		<input type="checkbox"/>
Brattle Group Retirement Plan ⇒ Vanguard Target Retirement 2045 (VITVX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Brattle Group Retirement Plan ⇒ Vanguard Total Bond Market Index Investor Shares (VBMFX) [MF]	SP	None	None		<input type="checkbox"/>
Congressional FCU checking [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Congressional FCU Money Market Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
GW & Wade Asset Managment ⇒ Fidelity Government Cash Reserves [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
GW & Wade Asset Managment ⇒ Franklin Utilities Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
GW & Wade Asset Managment ⇒ SPDR Gold TR Gold SHS [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Locust -Hwy 200 LLC [RP]		\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: Locust , NC, US					
Marsh & McLennan Companies, Inc. (MMC) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
McHenry-McHenry partnership ⇒ Mortgage Held on 215 Robinson Road [DO]		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
McHenry-Putman Partnership [RP]		\$15,001 - \$50,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Gastonia, NC, US DESCRIPTION: 109 W. 8th Ave					
McHenry-Putman Partnership [RP]		\$15,001 - \$50,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Gastonia, NC, US DESCRIPTION: 5224 Union Rd					
Vanguard 529 College Savings Plan ⇒ Vanguard 529 College Savings Plan [5P]	DC	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: NV					

* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Brattle Group Retirement Plan ⇒ Vanguard Total Bond Market Index Investor Shares (VBMFX) [MF]	SP	02/10/2022	E	\$15,001 - \$50,000	
DESCRIPTION: Fund to fund transfer within spouse's retirement account.					

* 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
Federal Communications Commission	spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo	October 2020	Mortgage on personal residence, Denver, NC	\$250,001 - \$500,000
JT	PenFed Credit Union	July 2021	mortgage on personal residence in Washington, DC	\$1,000,001 - \$5,000,000
JT	Congressional Federal Credit Union	September 2022	Home equity line of credit on Denver, NC home	Over \$50,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Partner	McHenry-Putman Partnership
Sole Proprietor	McHenry Real Estate
COMMENTS: No assets	
Partner	McHenry-McHenry partnership

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?
American Enterprise Institute	03/10/2022	03/12/2022	Washington, DC - Sea Island, GA - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

||
||
||

- Brattle Group Retirement Plan (Owner: SP)
- GW & Wade Asset Managment (Owner: SP)
- McHenry-McHenry partnership (50% Interest)
LOCATION: US
- Vanguard 529 College Savings Plan (Owner: DC)
LOCATION: NV

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. Patrick T. McHenry , 05/14/2024