



Filing ID #10062442

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Andrea S. Morse  
**Status:** Congressional Candidate  
**State/District:** NY11

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 07/14/2024  
**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
1830-1836 Dorset West Road [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Dorset, VT, US DESCRIPTION: 1830-1836 Dorset West Road Dorset, Vermont one-half interest					
1830-1836 Dorset West Road [RP]	SP	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Dorset, VT, US DESCRIPTION: one-half interest in 1830-1836 Dorset West Road, Dorset VT					
391 Forest Avenue [RP]		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Staten Island, NY, US DESCRIPTION: 391 Forest Avenue Staten Island, New York 10301					
4 Sparrow Lane [RP]		\$1,000,001 - \$5,000,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Edgartown, MA, US DESCRIPTION: 4 Sparrow Lane Edgartown, MA 02539					
Andrea S. Morse, Attorney at Law, 100% Interest [OL]		\$100,001 - \$250,000	legal fees	\$50,001 - \$100,000	\$50,001 - \$100,000

<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>
LOCATION: Staten Island, NY, US DESCRIPTION: law office					
Basking Ridge Investors Inc [DS]		\$15,001 - \$50,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
DESCRIPTION: DST					
Chase [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Chase checking account spouse					
Citibank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Citibank checking					
Citibank [FN]	SP	\$100,001 - \$250,000	Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: annuity for retirement					
Citibank IRA [IH]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: IRA					
Dorset Commercial Interiors Inc. [PS]	JT	\$1 - \$1,000	Dividends	None	\$1 - \$200
DESCRIPTION: spouse contractor business					
Green Peak Construction Inc. [PS]	JT	\$1 - \$1,000	Dividends	None	None
DESCRIPTION: spouse contractor business					
Northfield Savings Bank [BA]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: interest on a CD					
NYS 529 plan [5P]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	None	None
LOCATION: NY DESCRIPTION: 529 Plan for candidate's children					
Schwab [IH]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: IRA at Schwab					
Schwab [IH]		\$250,001 - \$500,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: SEP IRA					
Schwab [CS]	DC	\$15,001 - \$50,000	Dividends, Interest	\$1 - \$200	None
DESCRIPTION: Schwab account for dependent child					

<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>
Schwab [CS]	SP	\$1,000,001 - \$5,000,000	Dividends, Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: Schwab investment account					
United Parcel Service, Inc. Common Stock (UPS) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: UPS stock					

\* 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>
Andrea S. Morse, Attorney at Law	law practice	\$83,170.00	\$74,411.00

### **SCHEDULE D: LIABILITIES**

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
	SBA	March 2022	SBA loan for small business during COVID	\$250,001 - \$500,000
	NYC Pursuit	2022	NYC small business loan during COVID	\$15,001 - \$50,000
	Citibank mortgage	2008	mortgage on 391 Forest Avenue, Staten Island, New York 10301	\$100,001 - \$250,000

### **SCHEDULE E: POSITIONS**

<b>Position</b>	<b>Name of Organization</b>
board member	Forest Avenue Business Improvement District
Vice President	Dorset Commercial Interiors Inc.
President	Green Peak Construction Inc.

### **SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

## **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:** Andrea S. Morse , 07/14/2024