



Filing ID #10055334

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Joe Salerno  
**Status:** Congressional Candidate  
**State/District:** NJ02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2023  
**Filing Date:** 10/17/2023  
**Period Covered:** 01/01/2022– 09/30/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ally Bank Savings [BA]		\$500,001 - \$1,000,000	Interest	\$15,001 - \$50,000	\$5,001 - \$15,000
Bank of America Checking and Savings [BA]		\$250,001 - \$500,000	Interest	\$1 - \$200	\$201 - \$1,000
Capital One Savings [BA]		\$500,001 - \$1,000,000	Interest	\$15,001 - \$50,000	\$5,001 - \$15,000
CDS Consulting, Inc. [PS]		\$1,001 - \$15,000	None		
DESCRIPTION: Provider of financial software systems					
Citizens Checking [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity Brokerage ⇒ Berkshire Hathaway Inc. (BRK.A) [ST]		\$1,000,001 - \$5,000,000	None		
Fidelity Brokerage ⇒ Boeing Company (BA) [ST]		\$50,001 - \$100,000	None		
Fidelity Brokerage ⇒		\$100,001 -	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Deere & Company (DE) [ST]		\$250,000			
Fidelity Brokerage ⇒ FedEx Corporation (FDX) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Fidelity Brokerage ⇒ Fidelity Floating Rate High Income [MF]		\$250,001 - \$500,000	Interest	\$15,001 - \$50,000	\$5,001 - \$15,000
Fidelity Brokerage ⇒ Fidelity Government Money Market [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$1 - \$200
Fidelity Brokerage ⇒ Freeport-McMoRan, Inc. (FCX) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Fidelity Brokerage ⇒ Intel Corporation (INTC) [ST]		None	Dividends	None	\$1,001 - \$2,500
Fidelity Brokerage ⇒ Intel Corporation (INTC) [ST]		None	Capital Gains	\$5,001 - \$15,000	None
Fidelity Brokerage ⇒ Microsoft Corporation (MSFT) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity Brokerage ⇒ Nucor Corporation (NUE) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Fidelity Brokerage ⇒ RTX Corporation (RTX) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity Brokerage ⇒ SPDR GOLD TR GOLD SHS - GLD [EF]		\$100,001 - \$250,000	Capital Gains	None	\$201 - \$1,000
Fidelity Brokerage ⇒ SPDR SER TR S&P METALS MNG - XME [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity Brokerage ⇒ Union Pacific Corporation (UNP) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Fidelity Brokerage ⇒ United States Steel Corporation (X) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Fidelity Rollover IRA from IHS Markit 401K ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Rollover IRA from IHS Markit 401K ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	None		
Fidelity Rollover IRA from IHS Markit 401K ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Rollover IRA from IHS Markit 401K ⇒ Fidelity 500 Index Fund - FXAIX [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Rollover IRA from IHS Markit 401K ⇒ Fidelity Extended Market Index Fund - FSMAX [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Rollover IRA from IHS Markit 401K ⇒ Fidelity Government Money Market - SPAXX [BA]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Rollover IRA from IHS Markit 401K ⇒ Fidelity Small Cap Value - FCPVX [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Rollover IRA from IHS Markit 401K ⇒ Tesla, Inc. (TSLA) [ST]		\$1,001 - \$15,000	None		
Fidelity Rollover IRA from IHS Markit 401K ⇒ Vanguard Index FDS Vanguard Growth ETF - VUG [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Rollover IRA from IHS Markit 401K ⇒ Vanguard Index FDS Vanguard Total STK MKT - VTI [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Rollover IRA from IHS Markit 401K ⇒ Vanguard World FDS Vanguard Information Technology ETF - VGT [EF]		\$15,001 - \$50,000	Tax-Deferred		
Gimme Health [PS] DESCRIPTION: Producer of gimme seaweed snacks		\$15,001 - \$50,000	None		
Goldman Sachs 80/20 Smart Beta [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Goldman Sachs Marcus Savings [BA]		\$500,001 - \$1,000,000	Interest	\$15,001 - \$50,000	\$5,001 - \$15,000
IHS Markit Ltd. Common Shares (INFO) [ST]		None	Capital Gains	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ipreo LTS LLC [PS]		None	Capital Gains	None	\$100,001 - \$1,000,000
DESCRIPTION: Provider of financial software systems					
Loan to Joe Salerno for Congress Inc. [DO]		\$250,001 - \$500,000	None		
Merrill IRA ⇒ Airbnb, Inc. - Class A (ABNB) [ST]		\$1,001 - \$15,000	None		
Merrill IRA ⇒ Atlassian Corporation - Class A (TEAM) [ST]		\$15,001 - \$50,000	None		
Merrill IRA ⇒ Bank of America Corporation (BAC) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Merrill IRA ⇒ Bank of America Money Market [BA]		\$15,001 - \$50,000	Tax-Deferred		
Merrill IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$250,001 - \$500,000	None		
Merrill IRA ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Merrill IRA ⇒ Morgan Stanley (MS) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Merrill IRA ⇒ Southern Copper Corporation (SCCO) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Merrill IRA ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	None		
Merrill IRA - DS ⇒ Amazon.com, Inc. (AMZN) [ST]	SP	\$1,001 - \$15,000	None		
Merrill IRA - DS ⇒ Bank of America Money Market [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill IRA - DS ⇒ Goldman Sachs Group, Inc. (GS) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill IRA - DS ⇒ Morgan Stanley (MS) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Merrill IRA - DS ⇒ NVIDIA Corporation (NVDA) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Merrill IRA - DS ⇒ Tesla, Inc. (TSLA) [ST]	SP	\$15,001 - \$50,000	None		
Morgan Stanley / ET Brokerage ⇒ Akamai Technologies, Inc. (AKAM) [ST]		\$100,001 - \$250,000	None		
Morgan Stanley / ET Brokerage ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$250,001 - \$500,000	None		
Morgan Stanley / ET Brokerage ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$250,001 - \$500,000	None		
Morgan Stanley / ET Brokerage ⇒ Amazon.com, Inc. (AMZN) [ST]		\$15,001 - \$50,000	None		
Morgan Stanley / ET Brokerage ⇒ Apple Inc. (AAPL) [ST]		\$500,001 - \$1,000,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Morgan Stanley / ET Brokerage ⇒ Bank of America Corporation (BAC) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Morgan Stanley / ET Brokerage ⇒ Booking Holdings Inc. (BKNG) [ST]		\$100,001 - \$250,000	None		
Morgan Stanley / ET Brokerage ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Morgan Stanley / ET Brokerage ⇒ Citrix Systems, Inc. (CTXS) [ST]		None	Capital Gains	None	\$50,001 - \$100,000
Morgan Stanley / ET Brokerage ⇒ Corning Incorporated (GLW) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
Morgan Stanley / ET Brokerage ⇒ Datadog, Inc. - Class A (DDOG) [ST]		\$50,001 - \$100,000	None		
Morgan Stanley / ET Brokerage ⇒		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Dynatrace, Inc. (DT) [ST]					
Morgan Stanley / ET Brokerage ⇒ Dynatrace, Inc. (DT) [ST]		None	Capital Gains	\$2,501 - \$5,000	None
Morgan Stanley / ET Brokerage ⇒ EPAM Systems, Inc. (EPAM) [ST]		None	Capital Gains	\$1,001 - \$2,500	None
Morgan Stanley / ET Brokerage ⇒ F5, Inc. (FFIV) [ST]		\$15,001 - \$50,000	None		
Morgan Stanley / ET Brokerage ⇒ Jabil Inc. (JBL) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley / ET Brokerage ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley / ET Brokerage ⇒ Morgan Stanley Money Market [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Morgan Stanley / ET Brokerage ⇒ NVIDIA Corporation (NVDA) [ST]		\$500,001 - \$1,000,000	Dividends	\$1 - \$200	\$201 - \$1,000
Morgan Stanley / ET Brokerage ⇒ Skyworks Solutions, Inc. (SWKS) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley / ET Brokerage ⇒ Twitter, Inc. (TWTR) [ST]		None	Capital Gains	None	\$15,001 - \$50,000
Morgan Stanley / ET Brokerage ⇒ Vmware, Inc. Common stock, Class A (VMW) [ST]		None	Capital Gains	\$50,001 - \$100,000	None
Morgan Stanley / ET Brokerage ⇒ Vmware, Inc. Common stock, Class A (VMW) [ST]		\$15,001 - \$50,000	None		
Morgan Stanley Savings [BA]		\$500,001 - \$1,000,000	Interest	\$15,001 - \$50,000	\$5,001 - \$15,000
Mortgage Loan to Family Member [DO]		\$100,001 - \$250,000	Interest	None	None
DESCRIPTION: Interest due at maturity					
Pyramid Healthcare [PS]		None	Capital Gains	None	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Provider of treatment to people dealing with alcohol and/or drug disorders, mental health disorders and adolescent behavioral problems.					
S&P Global Inc. (SPGI) [ST]		\$50,001 - \$100,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Value includes unvested restricted stock					
Schwab Brokerage ⇒ Fidelity NASDAQ - ONEQ [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Schwab Brokerage ⇒ iShares Russell 1000 Growth - IWF [EF]		\$500,001 - \$1,000,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Schwab Brokerage ⇒ iShares Russell 1000 Value - IWD [EF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
Schwab Brokerage ⇒ iShares Russell 2000 Growth - IWO [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Brokerage ⇒ iShares Russell 2000 Value - IWN [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Brokerage ⇒ iShares Russell Mid Cap Growth - IWP [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Schwab Brokerage ⇒ iShares Russell Mid Cap Value - IWS [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Schwab Brokerage ⇒ Schwab One [BA]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$1 - \$200
Schwab Brokerage ⇒ SPDR S&P 500 - SPY [EF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
Schwab Brokerage - Dependent ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	DC	\$1,001 - \$15,000	None		
Schwab Brokerage - Dependent ⇒ Amazon.com, Inc. (AMZN) [ST]	DC	\$1,001 - \$15,000	None		
Schwab Brokerage - Dependent ⇒ Apple Inc. (AAPL) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Brokerage - Dependent ⇒	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>
Berkshire Hathaway Inc. New (BRK.B) [ST]					
Schwab Brokerage - Dependent ⇒ Boeing Company (BA) [ST]	DC	\$1 - \$1,000	None		
Schwab Brokerage - Dependent ⇒ Schwab One Cash [BA]	DC	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
US Treasury Notes and Savings Bond [GS]		\$500,001 - \$1,000,000	Interest	\$5,001 - \$15,000	None
Zelta AI [PS]		\$1,001 - \$15,000	None		
DESCRIPTION: Provider of software used by businesses to analyze customer data					

\* 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

<b>Source</b>	<b>Type</b>	<b>Amount Current Year to Filing</b>	<b>Amount Preceding Year</b>
Markit North America	Salary and other compensation	\$97,183.00	\$2,247,056.00
CDS Consulting	Passive income owed for prior software development work	\$.00	\$6,000.00

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Chair	Joe Salerno for Congress Inc.
Board Member	Friends of Princeton Sprint Football
Board Member and Officer	CDS Consulting Inc.

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## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2022	S&P Global	I participate in the stock plan of my prior employer. I have rights to unvested restricted stock units and performance units. I reported the value of those units in Schedule A. I also pay to participate in the company health plan under COBRA.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Fidelity Brokerage  
LOCATION: US
- Fidelity Rollover IRA from IHS Markit 401K
- Merrill IRA
- Merrill IRA - DS (Owner: SP)
- Morgan Stanley / ET Brokerage  
LOCATION: US
- Schwab Brokerage  
LOCATION: US
- Schwab Brokerage - Dependent (Owner: DC)  
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:** Joe Salerno , 10/17/2023