



Filing ID #10050910

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Jill Andrea Lochner
Status: Congressional Candidate
State/District: NY21

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 05/12/2023
Period Covered: 01/01/2022– 04/30/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chase ⇒ Personal Checking Account [BA]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Chase ⇒ Personal Checking Account [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Chase ⇒ Personal Savings Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Chase ⇒ Personal Savings Account [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Chase ⇒ Personal Savings Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Chase ⇒ Savings Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Cryptocurrency ⇒ BTC [OT]		\$1,001 - \$15,000	Capital Gains	None	None
DESCRIPTION: Cryptocurrency					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Cryptocurrency ⇒ ETH [OT]		\$1,001 - \$15,000	Capital Gains	None	None
DESCRIPTION: Cryptocurrency					
Cryptocurrency ⇒ XRP [OT]		\$1 - \$1,000	Capital Gains	None	None
DESCRIPTION: Cryptocurrency					
Fidelity 401k ⇒ FJTKX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity 401k ⇒ FSMAX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity 401k ⇒ FSPSX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity 401k ⇒ FXAIX [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Fidelity 401k ⇒ SPAXX [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Fidelity Brokerage ⇒ FCASH [OT]	SP	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Cash holdings					
Fidelity Cash Account ⇒ QUSBQ [MF]	SP	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity IRA ⇒ FDRXX [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
Fidelity IRA ⇒ KeyCorp (KEY) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity IRA ⇒ Norwegian Cruise Line Holdings Ltd. Ordinary Shares (NCLH) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity IRA ⇒ QPCBQ [MF]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Joint Brokerage ⇒ FCASH [OT]	JT	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Cash holdings					
Fidelity UTMA ⇒ Carnival Corporation (CCL) [ST]		\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
Fidelity UTMA ⇒ FCASH [OT]		\$1 - \$1,000	None		
DESCRIPTION: Cash holdings					
Fidelity UTMA ⇒ FCASH [OT]	DC	\$1,001 - \$15,000	None		
DESCRIPTION: Cash holdings					
Fidelity UTMA ⇒ IEMG [EF]	DC	\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
Fidelity UTMA ⇒ IEMG [MF]	DC	\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
Fidelity UTMA ⇒ IEMG [MF]	DC	\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
Fidelity UTMA ⇒ IEMG [EF]	DC	\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
Fidelity UTMA ⇒ IEMG [MF]	DC	\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
Fidelity UTMA ⇒ Rite Aid Corporation (RAD) [ST]		\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
Fidelity UTMA ⇒ Rite Aid Corporation (RAD) [ST]		\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
Fidelity UTMA ⇒ SPAXX [MF]		\$1 - \$1,000	None		
Fidelity UTMA ⇒ SPAXX [MF]		\$1 - \$1,000	None		
Fidelity UTMA ⇒ SPAXX [MF]	DC	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity UTMA ⇒ SPAXX [MF]	DC	\$1,001 - \$15,000	None		
Fidelity UTMA ⇒ SPAXX [MF]	DC	\$1,001 - \$15,000	None		
Fidelity UTMA ⇒ Under Armour, Inc. Class C (UA) [ST]	DC	\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
Key Bank ⇒ Business Checking [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Key Bank ⇒ Personal Checking Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Rental Property [RP]		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Rochester, NY, US					
Toro Company (TTC) [ST]		\$1,001 - \$15,000	Capital Gains	\$2,501 - \$5,000	None
Trustco Bank ⇒ Personal Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

* 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 Current Year to Filing	Amount Preceding Year
Coordinates Operations, LLC	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Newrez LLC	Sep 2003	Mortgage	\$15,001 - \$50,000
	Nelnet Loan Servicing	May 2006	Student loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Chase
LOCATION: US
- Cryptocurrency
LOCATION: US
- Fidelity 401k (Owner: SP)
- Fidelity Brokerage (Owner: SP)
LOCATION: US
- Fidelity Cash Account (Owner: SP)
LOCATION: US
- Fidelity IRA
- Fidelity IRA (Owner: SP)
- Fidelity Joint Brokerage (Owner: JT)
LOCATION: US
- Fidelity UTMA (Owner: DC)
LOCATION: NY, US
- Fidelity UTMA
LOCATION: US
- Fidelity UTMA
LOCATION: US
- Fidelity UTMA
LOCATION: US
- Key Bank
LOCATION: US
- Trustco Bank
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: Jill Andrea Lochner , 05/12/2023