



Filing ID #10052677

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Kellen Curry
Status: Congressional Candidate
State/District: NY03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 05/4/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 Account ⇒ Growth Portfolio [MF]		\$1,001 - \$15,000	None		
529 Account ⇒ Mid-Cap Stock Index Portfolio [MF]		\$1,001 - \$15,000	None		
529 Account ⇒ Value Stock Index Portfolio [MF]		\$1,001 - \$15,000	None		
Crypto Currency [OT] DESCRIPTION: Bitcoin Cryptocurrency		\$1 - \$1,000	None		
Health Savings Account ⇒ FIDELITY GOVERNMENT CASH RESERVES [MF]		\$1 - \$1,000	None		
Health Savings Account ⇒ FIDELITY LOW VOLATILITY FACTOR ETF [EF]		\$1,001 - \$15,000	None		
Health Savings Account ⇒ FIDELITY NASDAQ COMPOSITE INDEX [MF]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
JP Morgan 401-K ⇒ S&P MidCap 400 Index Fund [MF]		\$50,001 - \$100,000	None		
JP Morgan 401-K ⇒ Small Cap Core Fund [MF]		\$50,001 - \$100,000	None		
JP Morgan 401-K ⇒ Target Date 2050 Fund [MF]		\$15,001 - \$50,000	None		
JP Morgan Employee Stock Purchase Plan [CS]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: shares purchased through the corporate program for employee stock purchase plan					
JP Morgan Restricted Stock Units [CS]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
DESCRIPTION: Previously granted equity under the Long-Term Incentive Plan					
Navy Federal Checking [BA]		\$1 - \$1,000	None		
Navy Federal Saving [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Real Estate Partnerships ⇒ Breckenridge Apartments LLC [OT]		\$15,001 - \$50,000	Rent	\$1 - \$200	None
DESCRIPTION: Member and Limited Partner in rental property, Henderson, CO.					
Real Estate Partnerships ⇒ Broadstone Apartments [OT]		\$50,001 - \$100,000	Rent	None	None
DESCRIPTION: Member and Limited Partner in rental property, San Bernardino, CA.					
Real Estate Partnerships ⇒ Cooper Chase LLC [OT]		\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	\$2,501 - \$5,000
DESCRIPTION: Member and Limited Partner in rental property, East Lake, CO.					
Real Estate Partnerships ⇒ Falcon Heritage Investments LLC [OT]		\$1,001 - \$15,000	Rent	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Member and Limited Partner in rental property, Cleveland, OH.					
Real Estate Partnerships ⇒ Frontier Justice LLC [OT]		\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Member and Limited Partner in rental property, Kansas City, MO.					
Real Estate Partnerships ⇒ Newport Square LLC [OT]		\$15,001 - \$50,000	Rent	None	\$1,001 - \$2,500
DESCRIPTION: Member and Limited Partner in rental property, Henderson, CO.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rental Property [RP]		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Alexandria, VA, US					
Series EE Savings Bond [GS]		\$1,001 - \$15,000	None		
Series I Savings Bond [GS]		\$1,001 - \$15,000	None		
Thrift Savings Plan ⇒ C Fund [GS]		\$50,001 - \$100,000	None		
Thrift Savings Plan ⇒ G Fund [GS]		\$15,001 - \$50,000	None		
Thrift Savings Plan ⇒ S Fund [GS]		\$15,001 - \$50,000	None		
USAA Checking [BA]		\$1,001 - \$15,000	None		
USAA Savings [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ American Airlines Group, Inc. (AAL) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ BorgWarner Inc. (BWA) [ST]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ Bridge Investment Group Holdings Inc. Class A (BRDG) [ST]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ Delta Air Lines, Inc. (DAL) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Fiserv, Inc. (FISV) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒		\$1 - \$1,000	Capital Gains,	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fisker Inc. Class A (FSR) [ST]			Dividends		
Vanguard Brokerage ⇒ Gaming and Leisure Properties, Inc. (GLPI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ Global Payments Inc. (GPN) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ International Business Machines Corporation (IBM) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ JBG SMITH Properties Common Shares (JBGS) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ JFrog Ltd. - Ordinary shares (FROG) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Joby Aviation, Inc. (JOBY) [ST]		\$1 - \$1,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Jones Lang LaSalle Incorporated (JLL) [ST]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ Kyndryl Holdings, Inc. (KD) [ST]		\$1 - \$1,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Magna International, Inc. (MGA) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Vanguard Brokerage ⇒ Nike, Inc. (NKE) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ Nikola Corporation (NKLA) [ST]		\$1 - \$1,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ NVIDIA Corporation (NVDA) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ Okta, Inc. - Class A (OKTA) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒		\$1,001 - \$15,000	Capital Gains,	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Palantir Technologies Inc. Class A (PLTR) [ST]			Dividends		
Vanguard Brokerage ⇒ Paycom Software, Inc. (PAYC) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Privia Health Group, Inc. (PRVA) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ ProLogis, Inc. (PLD) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ Qorvo, Inc. (QRVO) [ST]		\$1 - \$1,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Rivian Automotive, Inc. - Class A (RIVN) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Seer, Inc. - Class A (SEER) [ST]		\$1 - \$1,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Seer, Inc. - Class A (SEER) [ST]		\$1 - \$1,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Sotera Health Company (SHC) [ST]		\$1 - \$1,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Toll Brothers, Inc. (TOL) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ Treace Medical Concepts, Inc. (TMCI) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	None
Vanguard Brokerage ⇒ Vanguard Federal Money Market Fund [MF]		\$1,001 - \$15,000	None		
Vanguard Brokerage ⇒ VANGUARD S&P 500 INDEX ETF [EF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Vanguard Brokerage ⇒ VICTORY NASDAQ 100 INDEX [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Vanguard Brokerage ⇒ Williams Companies, Inc. (WMB) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Brokerage ⇒ Williams-Sonoma, Inc. Common Stock (WSM) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Vanguard Roth IRA ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	None		
Vanguard Roth IRA ⇒ Aptiv PLC Ordinary Shares (APTIV) [ST]		\$1,001 - \$15,000	None		
Vanguard Roth IRA ⇒ BorgWarner Inc. (BWA) [ST]		\$1 - \$1,000	None		
Vanguard Roth IRA ⇒ VANGUARD ENERGY INVESTOR CL [MF]		\$1,001 - \$15,000	None		
Vanguard Roth IRA ⇒ Vanguard Federal Money Market Fund [MF]		\$1 - \$1,000	Capital Gains, Dividends	None	None
Vanguard Roth IRA ⇒ VANGUARD GLOBAL ESG SELECT STOCK INVESTOR CL [MF]		\$1,001 - \$15,000	None		
Vanguard Roth IRA ⇒ VANGUARD TARGET RETIREMENT 2055 INVESTOR CL [MF]		\$100,001 - \$250,000	None		
Vanguard Traditional IRA [IH]		None	None		

* 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
JP Morgan	salary	\$129,000.00	\$247,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Navy Federal Credit Union	April 2013	Mortgage on investment property	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member and Limited Partner	BRECKENRIDGE APARTMENTS LLC
Member and Limited Partner	BROADSTONE MULTIFAMILY INVESTMENTS LLC
Member and Limited Partner	COPPER CHASE LLC
Member and Limited Partner	FALCON HERITAGE INVESTMENT GRP LLC
Member and Limited Partner	KANSAS CITY JUSTICE INVESTMENTS, LLC
Member and Limited Partner	NEWPORT SQUARE LLC
Vice President	JP Morgan & Chase Co
COMMENTS: Resigned March 31, 2023	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
April 2023	JP Morgan and Kellen Curry	Continued participation in employee benefit plan.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">◦ 529 Account LOCATION: NY◦ Health Savings Account LOCATION: US◦ JP Morgan 401-K◦ Real Estate Partnerships LOCATION: US◦ Thrift Savings Plan LOCATION: US◦ Vanguard Brokerage LOCATION: US

- Vanguard Roth IRA

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: Kellen Curry , 05/4/2023