



Filing ID #10050910

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

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] DESCRIPTION: Cryptocurrency | | \$1,001 - \$15,000 | Capital Gains | None | None |
| Cryptocurrency ⇒ XRP [OT] DESCRIPTION: Cryptocurrency | | \$1 - \$1,000 | Capital Gains | None | None |
| 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] DESCRIPTION: Cash holdings | SP | \$1 - \$1,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| 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] DESCRIPTION: Cash holdings | JT | \$1 - \$1,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Fidelity UTMA ⇒ Carnival Corporation (CCL) [ST] | | \$1 - \$1,000 | Capital Gains | \$1 - \$200 | \$1 - \$200 |
| Fidelity UTMA ⇒ FCASH [OT] DESCRIPTION: Cash holdings | | \$1 - \$1,000 | None | | |
| Fidelity UTMA ⇒ FCASH [OT] DESCRIPTION: Cash holdings | DC | \$1,001 - \$15,000 | None | | |
| 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] LOCATION: Rochester, NY, US | | \$100,001 - \$250,000 | Rent | \$5,001 - \$15,000 | \$5,001 - \$15,000 |
| 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 (Owner: DC)
LOCATION: NY, US
- Fidelity UTMA (Owner: DC)
LOCATION: NY, 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