



Filing ID #10055589

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Monica Tranel
Status: Congressional Candidate
State/District: MT01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 08/10/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Joint Investments ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Amazon.com, Inc. (AMZN) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ AMBFX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Apple Inc. (AAPL) [ST]	JT	\$100,001 - \$250,000	None		
Joint Investments ⇒ ARK Autonomous Technology & Robotics ETF (ARKQ) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ ASPZX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Costco Wholesale Corporation (COST) [ST]	JT	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Joint Investments ⇒ CPXIX [MF]	JT	\$1,001 - \$15,000	None		
Joint Investments ⇒ CXE [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ DBLTX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ EDD [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ EIFAX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ EILTX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Eli Lilly and Company (LLY) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ ETG [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ First Trust Cloud Computing ETF (SKYY) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ First Trust Morningstar ETF (FDL) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ GlobalFoundries Inc. - Ordinary Share (GFS) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Invesco KBW Bank ETF (KBWB) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒	JT	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares Biotechnology ETF (IBB) [ST]					
Joint Investments ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ iShares Core S&P U.S. Value ETF (IUSV) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ iShares U.S. Infrastructure ETF (IFRA) [ST]	JT	\$1,001 - \$15,000	None		
Joint Investments ⇒ MADCX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Materials Select Sector SPDR (XLB) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ MWTIX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ MWTIX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Ormat Technologies, Inc. (ORA) [ST]	JT	\$100,001 - \$250,000	None		
Joint Investments ⇒ Pacer Data & Infrastructure Real Estate ETF (SRVR) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Pfizer, Inc. (PFE) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ PIUHX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒	JT	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
PONPX [MF]					
Joint Investments ⇒ PTSPX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Real Estate Select Sector SPDR Fund (XLRE) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ ReNew Energy Global plc - Class A Shares (RNW) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ SGENX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ SGIIX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ SGOIX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ SHSSX [MF]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]	JT	\$100,001 - \$250,000	None		
Joint Investments ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ SPDR Select Sector Fund - Health Care (XLV) [ST]	JT	\$100,001 - \$250,000	None		
Joint Investments ⇒ SPDR Select Sector Fund - Industrial (XLI) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ The Communication Services Select Sector SPDR Fund (XLC) [ST]	JT	\$100,001 - \$250,000	None		
Joint Investments ⇒ VanEck Semiconductor ETF (SMH) [ST]	JT	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Joint Investments ⇒ Vanguard Financials ETF (VFH) [ST]	JT	\$100,001 - \$250,000	None		
Joint Investments ⇒ Vanguard Information Tech ETF (VGT) [ST]	JT	\$100,001 - \$250,000	None		
Joint Investments ⇒ Vanguard Small-Cap ETF (VB) [ST]	JT	\$100,001 - \$250,000	None		
Joint Investments ⇒ Vanguard Small-Cap Value ETF (VBR) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Vanguard Value ETF (VTV) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Visa Inc. (V) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ YAFIX [MF]	JT	\$15,001 - \$50,000	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
Tranel Law Firm	Salary	N/A	N/A
Missoula Anesthesiologist	Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of America	2017	Mortgage	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
American Leadership Institute (New York City, NY, US)	Leadership Fellow

SCHEDULE A ASSET CLASS DETAILS

<div><div>Joint Investments (Owner: JT)</div><div>LOCATION: US</div></div>
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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: Monica Tranel , 08/10/2023