



Filing ID #10052761

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Claudia Tenney  
**Status:** Member  
**State/District:** NY24

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 08/2/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Adirondack Financial Services Invest Acct ⇒ Dodge & Cox Income Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Dodge and Cox International Fund (MF) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Dreyfus Ins Deposit Program [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Europacific Gwth Fd Cl-F-2 (MF) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ iShares TR Russell 2000ETF (EF) [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ iShares TR Russell Mid-Cap ETF (EF) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Metropolitan West Ttl Ret Bd Fund CL 1 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Metropolitan West Unconstrained BdFd (MF) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Adirondack Financial Services Invest Acct ⇒ MFS Growth Fund CL 1 (MF) [MF]		\$15,001 - \$50,000	Capital Gains	\$15,001 - \$50,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ OakMark Fund Investor Class Fund (MF) [BA]		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ SPDR Gold Tr Gold Shs [EF]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Vanecck Vectors ETF Tr Gold MINers [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Vanguard Index FDS S & P 500 ETF Shs (EF) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Vanguard S-T Investment Grade Fd (MF) [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Bank of Utica BA [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ American Funds Europacific (EF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ American Funds Growth Fund (EF) [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ BMO Small-Cap Value Fund (EF) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ Prudential High Yield Fund (EF) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ Vanguard 500 Idx Fund Adm [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ Vanguard Mid-Cap Index Fund Adm (EF) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. 401K account ⇒ Voya Intermediate Bond Fund (EF) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒		\$1,001 - \$15,000	Capital Gains,	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Clearbridge Apprec. C (MF) [BA]				Dividends	
Morgan Stanley Investment Acct ⇒ Clearbridge Appreciation A (EF) [BA]		\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Morgan Stanley Bank NA (BA) [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Berkshire Hathaway CL B New (MF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge Aggressive Growth Fd (EF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge Appreciation A (EF) [BA]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge International Value A (EF) [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge Value Trust A (EF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Adirondack Financial Services Invest Acct ⇒ American Funds Europacific Growth F2 [BA]		01/7/2022	P	\$1,001 - \$15,000	
Adirondack Financial Services Invest Acct ⇒ Dodge & Cox Income I [MF]		09/23/2022	P	\$1,001 - \$15,000	
Adirondack Financial Services Invest Acct ⇒ Dodge & Cox International Stock Fund [MF]		01/7/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Global X Silver Miners ETF [EF]		01/7/2022	P	\$1,001 - \$15,000	
Adirondack Financial Services Invest Acct ⇒		09/23/2022	P	\$15,001 - \$50,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
IShares 7-10 Year Treasury Bond [EF]					
Adirondack Financial Services Invest Acct ⇒ IShares 7-10 Year Treasury Bond ETF [EF]		09/23/2022	P	\$1,001 - \$15,000	
Adirondack Financial Services Invest Acct ⇒ Metropolitan West Unconstrained [EF]		09/23/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Metropolitan West Unconstrained BD [EF]		03/3/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Metwest Total Return Bond [EF]		09/23/2022	P	\$1,001 - \$15,000	
Adirondack Financial Services Invest Acct ⇒ MFS Growth I [MF]		01/7/2022	P	\$1,001 - \$15,000	
Adirondack Financial Services Invest Acct ⇒ Oakmark Investor [BA]		01/7/2022	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ SPDR Gold Shares [EF]		01/7/2022	P	\$1,001 - \$15,000	
Adirondack Financial Services Invest Acct ⇒ Vanec Gold Miners EFT [EF]		01/7/2022	P	\$1,001 - \$15,000	
Adirondack Financial Services Invest Acct ⇒ Vanec Gold Miners ETF [EF]		09/23/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Vanguard Short Term Investment Grade [EF]		09/23/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>

\* 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
Mid York Press Inc.	Wages	\$25,527.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Rocket Mortgage	February 2022	Home Mortgage	\$100,001 - \$250,000
	Truist Bank	2022	Auto Loan	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
House Armed Services Committee	09/3/2022	09/9/2022	Washington Dulles IAD - Seoul ICN - Chinggis Khan Intl UBN - Taiwan Taoyuan Intl TPE - Syracuse Hancock Intl SYR	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mutual Educational and Cultural Exchange Act (MECEA) Trip	11/19/2022	11/23/2022	Washington DC - Doha - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Adirondack Financial Services Invest Acct  
LOCATION: US

DESCRIPTION: Adirondeck Financial Investment Acct

- Mid\_York Press Inc. 401K account
- Morgan Stanley Investment Acct  
LOCATION: US
- Morgan Stanley Trad. IRA  
DESCRIPTION: Morgan Stanley Traditional IRA

## **EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

- Yes  No

**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:** Hon. Claudia Tenney , 08/2/2023