



Filing ID #10061153

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/15/2024
Period Covered: 01/01/2023– 04/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Greg 401k ⇒ BlackRock Emerging Markets Fund Class I (MADCX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Greg 401k ⇒ Cohen & Steers Preferred Securities and Income Fund Inc. Class I (CPXIX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Greg 401k ⇒ DoubleLine Total Return Bond Fund Class I (DBLTX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Greg 401k ⇒ Eaton Vance Floating-Rate Advantaged Fund Class I (EIFAX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Greg 401k ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg 401k ⇒ First Trust Cloud Computing ETF (SKYY) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Greg 401k ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg 401k ⇒ iShares Biotechnology ETF (IBB) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg 401k ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg 401k ⇒ iShares U.S. Home Construction ETF (ITB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg 401k ⇒ iShares U.S. Infrastructure ETF (IFRA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg 401k ⇒ Materials Select Sector SPDR (XLB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg 401k ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]	SP	\$100,001 - \$250,000		Tax-Deferred	
Greg 401k ⇒ Pacer Data & Infrastructure Real Estate ETF (SRVR) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg 401k ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]	SP	\$250,001 - \$500,000		Tax-Deferred	
Greg 401k ⇒ PIMCO StocksPLUS International Fund (PIUHX) [MF]	SP	\$250,001 - \$500,000		Tax-Deferred	
Greg 401k ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg 401k ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	SP	\$50,001 - \$100,000		Tax-Deferred	
Greg 401k ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg 401k ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$100,001 - \$250,000		Tax-Deferred	

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Greg 401k ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Greg 401k ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Greg 401k ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Greg 401k ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Greg 401k ⇒ VanEck Semiconductor ETF (SMH) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg 401k ⇒ Vanguard Financials ETF (VFH) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Greg 401k ⇒ Vanguard Information Tech ETF (VGT) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Greg 401k ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Greg 529s ⇒ ISHARES DVSFD EQUITY A (ISEAT) [OT]	SP	\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: 529 Mutual Fund					
Greg 529s ⇒ ISHARES DVSFD EQUITY C (ISECT) [OT]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 529 Mutual Fund					
Greg 529s ⇒ ISHARES DVSFD FXD INC A (ISDAT) [OT]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: 529 Mutual Fund					
Greg IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg IRA ⇒ AMG Yacktman Focused Fund - Class I (YAFIX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Greg IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Greg IRA ⇒ ARK Autonomous Technology & Robotics ETF (ARKQ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg IRA ⇒ BlackRock Emerging Markets Fund Class I (MADCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg IRA ⇒ DoubleLine Total Return Bond Fund Class I (DBLTX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg IRA ⇒ First Eagle Overseas Fund Class I (SGOIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg IRA ⇒ iShares Core S&P U.S. Value ETF (IUSV) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg IRA ⇒ Pfizer, Inc. Common Stock (PFE) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg IRA ⇒ PIMCO StocksPLUS International Fund (PIUHX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Greg IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg IRA ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg IRA ⇒ Vanguard Value ETF (VTY) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg Roth 401k ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg Roth 401k ⇒	SP	\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AMG Yacktman Focused Fund - Class I (YAFIX) [MF]		\$100,000			
Greg Roth 401k ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Greg Roth 401k ⇒ BlackRock Emerging Markets Fund Class I (MADCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg Roth 401k ⇒ BlackRock HlthSc Op I (SHSSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg Roth 401k ⇒ First Eagle Global Fund Class I (SGIIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg Roth 401k ⇒ GlobalFoundries Inc. - Ordinary Share (GFS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg Roth 401k ⇒ Ormat Technologies, Inc. Common Stock (ORA) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Greg Roth 401k ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg Roth 401k ⇒ PIMCO StocksPLUS International Fund (PIUHX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg Roth 401k ⇒ PIMCO StocksPLUS International Fund (PIUHX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg Roth 401k ⇒ ReNew Energy Global plc - Class A Shares (RNW) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg Roth 401k ⇒ The Alger Fds II, Alger Spectra Fund Class Z (ASPZX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg Roth 401k ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg Roth 401k ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Greg Roth 401k ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Value ETF (VTY) [EF]					
Greg Roth 401k ⇒ Visa Inc. (V) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Greg Taxable ⇒ American Balanced Fund Class F-2 Shs (AMBFX) [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Greg Taxable ⇒ BlackRock Emerging Markets Fund Class I (MADCX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Greg Taxable ⇒ Eaton Vance Floating-Rate Advantaged Fund Class I (EIFAX) [MF]	SP	\$1,001 - \$15,000	Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Greg Taxable ⇒ Eli Lilly and Company Common Stock (LLY) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Greg Taxable ⇒ First Eagle Global Fund Class I (SGIIX) [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Greg Taxable ⇒ First Trust Morningstar ETF (FDL) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Greg Taxable ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Greg Taxable ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Greg Taxable ⇒ iShares Core S&P U.S. Value ETF (IUSV) [EF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Greg Taxable ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Greg Taxable ⇒ MFS High Income Municipal Trust Common Stock (CXE) [ST]	SP	\$1 - \$1,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
Greg Taxable ⇒ Morgan Stanley Emerging Markets Domestic Debt Fund,	SP	None	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Inc. Common Stock (EDD) [ST]					
Greg Taxable ⇒ Nuveen Municipal Credit Income Fund (NZF) [ST]	SP	\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Greg Taxable ⇒ Nuveen Quality Municipal Income Fund Common Stock (NAD) [ST]	SP	\$15,001 - \$50,000	Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Greg Taxable ⇒ Ormat Technologies, Inc. Common Stock (ORA) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Greg Taxable ⇒ Parametric TABS 5-To-15 Year Laddered Municipal Bond Fund Class I (EILTX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$201 - \$1,000
Greg Taxable ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends, Rent	\$1,001 - \$2,500	\$1,001 - \$2,500
Greg Taxable ⇒ PIMCO StocksPLUS International Fund (PIUHX) [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
Greg Taxable ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
HSA ⇒ First Eagle Global Fund Class A (SGENX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Monica 529s ⇒ ISHARES DVSFD EQUITY A (ISEAT) [OT]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: 529 Mutual Fund					
Monica 529s ⇒ ISHARES DVSFD FXD INC A (ISDAT) [OT]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: 529 Mutual Fund					
Monica SEP ⇒ BlackRock Emerging Markets Fund Class I (MADCX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Monica SEP ⇒ Cohen & Steers Preferred Securities and Income Fund Inc. Class I (CPXIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Monica SEP ⇒ DoubleLine Total Return Bond Fund Class I (DBLTX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Monica SEP ⇒ Eaton Vance Floating-Rate Advantaged Fund Class I (EIFAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [EF]		\$1 - \$1,000	Tax-Deferred		
Monica SEP ⇒ First Trust Cloud Computing ETF (SKYY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ iShares Biotechnology ETF (IBB) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ iShares U.S. Home Construction ETF (ITB) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ iShares U.S. Infrastructure ETF (IFRA) [EF]		\$1 - \$1,000	Tax-Deferred		
Monica SEP ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Monica SEP ⇒ Pacer Data & Infrastructure Real Estate ETF (SRVR) [EF]		\$1 - \$1,000	Tax-Deferred		
Monica SEP ⇒ PIMCO Income Fund Class I-2 (PONPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Monica SEP ⇒ PIMCO StocksPLUS International Fund (PIUHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Monica SEP ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Real Estate Select Sector SPDR Fund (XLRE) [EF]					
Monica SEP ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Monica SEP ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ VanEck Semiconductor ETF (SMH) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Monica SEP ⇒ Vanguard Financials ETF (VFH) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Monica SEP ⇒ Vanguard Information Tech ETF (VGT) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Monica SEP ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$15,001 - \$50,000	Tax-Deferred		

* Investment vehicle 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 Firm PC	Work income	N/A	\$34,284.00

Source	Type	Amount Current Year to Filing	Amount Preceding Year
AMPLI	Fellowship	N/A	\$63,225.00
Missoula Anesthesiology	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Bank of America	February 2021	Mortgage	\$250,001 - \$500,000
SP	Bank of America	January 2012	Securities based loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	National Rowing Foundation
Member	Aquila

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
Diamond Willow Ranch (Malta, MT, US)	Representation

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Greg 401k (Owner: SP)
- Greg 529s (Owner: SP)
LOCATION: ME
- Greg IRA (Owner: SP)
- Greg Roth 401k (Owner: SP)
- Greg Taxable (Owner: SP)
- HSA (Owner: SP)
LOCATION: US
- Monica 529s
LOCATION: ME

- Monica SEP

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 , 05/15/2024