



Filing ID #10060652

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ryan Edward Mackenzie  
**Status:** Congressional Candidate  
**State/District:** PA07

## 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
PNC Bank Account [BA]		\$1,001 - \$15,000	None		
Retirement Account ⇒ American Funds Target Date Retirement 2055 R6 Fund [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: 401(k) Account					
Retirement Account ⇒ SERS Retirement Account [BA]		\$100,001 - \$250,000	None		
Retirement Account ⇒ Spartan 500 Index Pool Class F [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Retirement Account					
Roth IRA ⇒ ARK Innovation ETF (ARKK) [ST]		\$15,001 - \$50,000	None		
Roth IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Roth IRA ⇒ SPDR Dow Jones Industrial Average ETF (DIA)		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[ST]					
Roth IRA ⇒ SPDR S&P 500 (SPY) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Trust Account ⇒ PNC Wealth Management Account [OT]		\$100,001 - \$250,000	Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: PNC Wealth Management Account					
Wells Fargo Advisors Account [BA]		\$1 - \$1,000	None		
Wells Fargo Bank Account [BA]		\$1,001 - \$15,000	None		

\* 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
Commonwealth of Pennsylvania	Salary	\$44,342.65	\$102,110.80
Rodale Institute	Spouse Salary	\$25,476.92	\$71,704.35
Guardian Life Insurance Company of America	Wife's short-term disability benefits (maternity coverage)	\$6,753.60	N/A

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Rep. in the PA General Assembly	Pennsylvania General Assembly
Member	PA Aggregate Advisory Board
Member	PA Workforce Development Board
Member, Board of Directors	AHEPA #60 Apartments
Former Member, Board of Governors	Greater Lehigh Valley Chamber of Commerce

<b>Position</b>	<b>Name of Organization</b>
Member, Lehigh Executive Council	Lehigh Career & Technical Institute
Member	PA Economic Development Financing Authority
Member, Executive Committee	The Council of State Governments
Member, Executive Committee	The Council of State Governments - EAST
Member, Executive Committee	National Conference of State Legislators
Member, Northeastern Advisory Board	Strategic Early Warning Network
Member	PA DEP Recycling Fund Advisory Committee
Member, Lehigh Valley Advisory Board	Ben Franklin Technology Partners of Northeastern PA

## **SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

## **SCHEDULE A INVESTMENT VEHICLE DETAILS**

- Retirement Account
- Roth IRA
- Trust Account

## **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:** Hon. Ryan Edward Mackenzie , 05/15/2024