



Filing ID #10052414

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Morgan McGarvey  
**Status:** Member  
**State/District:** KY03

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2022  
**Filing Date:** 07/12/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chris IRA ⇒ AT&T Inc. (T) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris IRA ⇒ ATAI Life Sciences N.V. - Common Shares (ATAI) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris IRA ⇒ CareTrust REIT, Inc. (CTRE) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris IRA ⇒ Collectar Biosciences, Inc. (CLRB) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris IRA ⇒ Chris IRA Cash [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		
Chris IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Invesco S&P SmallCap Value with Momentum ETF (XSVM) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chris IRA ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Chris IRA ⇒ iShares Russell Top 200 ETF (IWL) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ iShares Russell Top 200 Growth Index Fund (IWY) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ iShares Silver Trust (SLV) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Chris IRA ⇒ Materials Select Sector SPDR (XLB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Microsoft Corporation (MSFT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ NVIDIA Corporation (NVDA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Real Estate Select Sector SPDR Fund (The) (XLRE) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Royal Dutch Shell PLC American Depositary Shares (SHEL) [ST]  DESCRIPTION: Previously reported as “RDS.A”	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Sabra Health Care REIT, Inc. (SBRA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Schwab Fundamental U.S. Large Company Index ETF (FNDX) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chris IRA ⇒ Schwab U.S. TIPs ETF (SCHP) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Chris IRA ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Chris IRA ⇒ SPDR Dow Jones Industrial Average ETF Trust (DIA) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Chris IRA ⇒ Twilio Inc. Class A (TWLO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Vanguard Materials ETF (VAW) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Vanguard Mid-Cap ETF (VO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris IRA ⇒ Vanguard Utilities ETF (VPU) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris Roth ⇒ AT&T Inc. (T) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ ATAI Life Sciences N.V. - Common Shares (ATAI) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ CareTrust REIT, Inc. (CTRE) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ Chris Roth Cash [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chris Roth ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris Roth ⇒ iShares Russell Top 200 ETF (IWL) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ iShares Russell Top 200 Growth ETF (IWY) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ iShares Silver Trust (SLV) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris Roth ⇒ Materials Select Sector SPDR (XLB) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ Microsoft Corporation (MSFT) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ NVIDIA Corporation (NVDA) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ Real Estate Select Sector SPDR Fund (The) (XLRE) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ Royal Dutch Shell PLC American Depositary Shares (SHEL) [ST]  DESCRIPTION: Previously reported as “RDS.A”	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ Sabra Health Care REIT, Inc. (SBRA) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ Schwab Fundamental U.S. Large Company Index ETF (FNDX) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab U.S. Large-Cap ETF (SCHX) [EF]					
Chris Roth ⇒ Schwab U.S. TIPs ETF (SCHP) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris Roth ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris Roth ⇒ SPDR Dow Jones Industrial Average ETF (DIA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris Roth ⇒ Twilio Inc. Class A (TWLO) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris Roth ⇒ Vanguard Materials ETF (VAW) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ Vanguard Mid-Cap ETF (VO) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ Vanguard S&P 500 ETF (VOO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris Roth ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris Roth ⇒ Vanguard Utilities ETF (VPU) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ AT&T Inc. (T) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ ATAI Life Sciences N.V. - Common Shares (ATAI) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ CareTrust REIT, Inc. (CTRE) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ Cellestar Biosciences, Inc. (CLRB) [ST]	SP	\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chris SEP ⇒ Chris SEP Cash [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		
Chris SEP ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ Invesco S&P SmallCap Value with Momentum ETF (XSVM) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ iShares Russell Top 200 ETF (IWL) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ iShares Russell Top 200 Growth ETF (IWY) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ iShares Silver Trust (SLV) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ Materials Select Sector SPDR (XLB) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ Microsoft Corporation (MSFT) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ NVIDIA Corporation (NVDA) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ Real Estate Select Sector SPDR Fund (The) (XLRE) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ Royal Dutch Shell PLC American Depositary Shares (SHEL) [ST]  DESCRIPTION: Previously reported as “RDS.A”	SP	\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chris SEP ⇒ Sabra Health Care REIT, Inc. (SBRA) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ Schwab Fundamental U.S. Large Company Index ETF (FNDX) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ Schwab U.S. TIPs ETF (SCHP) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ SPDR Dow Jones Industrial Average ETF (DIA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ Twilio Inc. Class A (TWLO) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ Vanguard Materials ETF (VAW) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Chris SEP ⇒ Vanguard Mid-Cap ETF (VO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ Vanguard S&P 500 ETF (VOO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chris SEP ⇒ Vanguard Utilities ETF (VPU) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Joint Brokerage ⇒ AT&T Inc. (T) [ST]	JT	\$1 - \$1,000	Capital Gains	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Joint Brokerage ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	JT	\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Joint Brokerage ⇒ iShares Russell Top 200 Growth ETF (IWY) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$201 - \$1,000
Joint Brokerage ⇒ Joint Brokerage Cash [BA]	JT	\$15,001 - \$50,000	Interest	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Microsoft Corporation (MSFT) [ST]	JT	None	Capital Gains, Dividends	Not Applicable	\$1,001 - \$2,500
Joint Brokerage ⇒ NextEra Energy, Inc. (NEE) [ST]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Sabra Health Care REIT, Inc. (SBRA) [ST]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]	JT	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Schwab U.S. Mid Cap ETF (SCHM) [EF]	JT	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Schwab U.S. TIPs ETF (SCHP) [EF]	JT	None	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]	JT	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Vanguard Div Appreciation ETF (VIG) [EF]	JT	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Vanguard Information Tech ETF (VGT) [EF]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Vanguard Mid-Cap ETF (VO) [EF]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$1 - \$200



Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Joint Brokerage ⇒ Vanguard Real Estate ETF (VNQ) [EF]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Vanguard Short-Term Treasury ETF (VGSH) [EF]	JT	None	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Vanguard Small-Cap ETF (VB) [EF]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Vanguard Small-Cap Growth ETF (VBK) [EF]	JT	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	JT	None	Capital Gains, Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	JT	None	Capital Gains, Dividends	Not Applicable	\$1,001 - \$2,500
Joint Brokerage ⇒ Vanguard Utilities ETF (VPU) [EF]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$1 - \$200
Joint Brokerage ⇒ Xtrackers MSCI EAFE Hedged Equity ETF (DBEF) [EF]	JT	\$1 - \$1,000	Dividends	Not Applicable	\$1 - \$200
Morgan Roth ⇒ AT&T Inc. (T) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ ATAI Life Sciences N.V. - Common Shares (ATAI) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ CareTrust REIT, Inc. (CTRE) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Invesco S&P SmallCap Value with Momentum ETF		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(XSVM) [EF]					
Morgan Roth ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Roth ⇒ iShares Russell Top 200 ETF (IWL) [EF]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ iShares Russell Top 200 Growth ETF (IWY) [EF]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ iShares Silver Trust (SLV) [EF]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Materials Select Sector SPDR (XLB) [EF]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Microsoft Corporation (MSFT) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Morgan Roth Cash [IH]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Roth ⇒ NVIDIA Corporation (NVDA) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Real Estate Select Sector SPDR Fund (The) (XLRE) [EF]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Royal Dutch Shell PLC American Depositary Shares (SHEL) [ST]  DESCRIPTION: Previously reported as “RDS.A”		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Sabra Health Care REIT, Inc. (SBRA) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Schwab Fundamental U.S. Large Company Index ETF (FNDX) [EF]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Roth ⇒ Schwab U.S. TIPs ETF (SCHP) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Roth ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Roth ⇒ SPDR Dow Jones Industrial Average ETF (DIA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Roth ⇒ Twilio Inc. Class A (TWLO) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Roth ⇒ Vanguard Materials ETF (VAW) [EF]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Vanguard Mid-Cap ETF (VO) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Roth ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Roth ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$1 - \$1,000	Tax-Deferred		
Morgan Roth ⇒ Vanguard Utilities ETF (VPU) [EF]		\$1 - \$1,000	Tax-Deferred		
NY 529 Plan - DC1 ⇒ Aggressive Age-Based Option: Blended Growth Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
NY 529 Plan - DC2 ⇒ Aggressive Age-Based Option: Blended Growth Portfolio [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
Republic Bank Checking [BA]	JT	\$1,001 - \$15,000	Interest	Not Applicable	\$1 - \$200
Republic Bank Savings [BA]	JT	\$15,001 - \$50,000	Interest	Not Applicable	\$1 - \$200
Results By Design LLC [OL]	SP	\$50,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Louisville, KY, US DESCRIPTION: Consulting firm		\$100,000			
State of Kentucky Legislators Benefit Plan [DB]		Undetermined	None		
Vanguard Brokerage ⇒ Vanguard Federal Money Market Fund (VMFXX) [MF]	JT	\$1,001 - \$15,000	Interest	Not Applicable	\$1 - \$200
Vanguard Brokerage ⇒ Vanguard Total World Stock Index ETF (VT) [EF]	JT	\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Yum China Holdings, Inc. (YUMC) [ST]		None	Capital Gains	Not Applicable	\$1,001 - \$2,500
Yum! Brands, Inc. (YUM) [ST]		\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000

\* 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
LifePoint Health	Spouse Salary	N/A	N/A
Heaven Hill	Spouse Salary	N/A	N/A
Morgan & Pottinger	Salary	N/A	\$68,062.44
Kentucky General Assembly	Legislator Salary	N/A	\$34,135.52

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Republic Bank & Trust	December 2016	Personal Mortgage	\$100,001 - \$250,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	New Directions Housing Corporation
Board Member	St. John Gardens Inc
COMMENTS: Nonprofit directly controlled by New Directions Housing Corporation.	
Board Member	New Vision Residential Services Inc
COMMENTS: Nonprofit directly controlled by New Directions Housing Corporation.	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2023	Morgan McGarvey and the state of Kentucky	Future Pension

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>Chris IRA (Owner: SP)</li><li>Chris Roth (Owner: SP)</li><li>Chris SEP (Owner: SP)</li><li>Joint Brokerage (Owner: JT) LOCATION: US</li><li>Morgan Roth</li><li>NY 529 Plan - DC1 (Owner: DC) LOCATION: NY</li><li>NY 529 Plan - DC2 (Owner: DC) LOCATION: NY</li><li>Vanguard Brokerage (Owner: JT) LOCATION: US</li></ul>
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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:** Hon. Morgan McGarvey , 07/12/2023