



Filing ID #10047769

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Patrick T. McHenry  
**Status:** Member  
**State/District:** NC10

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 05/16/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset   | Owner | Value of Asset        | Income Type(s) | Income      | Tx. > \$1,000?           |
|---|-------|-----------------------|----------------|-------------|--------------------------|
| Alliance Bank and Trust [PS]  |       | \$1 - \$1,000         | None           |             | <input type="checkbox"/> |
| DESCRIPTION: Stock in NC bank; available for public purchase but not publicly traded          |       |                       |                |             |                          |
| Brattle Group Retirement Plan ⇒ Vanguard Target Retirement 2045 (VITVX) [MF]                  | SP    | \$250,001 - \$500,000 | Tax-Deferred   |             | <input type="checkbox"/> |
| Brattle Group Retirement Plan ⇒ Vanguard Total Bond Market Index Investor Shares (VBMFX) [MF] |       |                       |                |             |                          |
| Congressional FCU checking [BA]   |       | \$15,001 - \$50,000   | None           |             | <input type="checkbox"/> |
| Congressional FCU Money Market Account [BA]   |       | \$50,001 - \$100,000  | Interest       | \$1 - \$200 | <input type="checkbox"/> |
| GW & Wade Asset Management ⇒ Fidelity Government Cash Reserves [MF]                           | SP    | \$1,001 - \$15,000    | Tax-Deferred   |             | <input type="checkbox"/> |
| GW & Wade Asset Management ⇒ Franklin Utilities Class A [MF]                                  | SP    | \$1,001 - \$15,000    | Tax-Deferred   |             | <input type="checkbox"/> |
| GW & Wade Asset Management ⇒  | SP    | \$1,001 - \$15,000    | Tax-Deferred   |             | <input type="checkbox"/> |

| Asset  | Owner | Value of Asset        | Income Type(s) | Income             | Tx. > \$1,000?           |
|--|-------|-----------------------|----------------|--------------------|--------------------------|
| SPDR Gold TR Gold SHS [EF]   |       |                       |                |                    | <input type="checkbox"/> |
| Locust -Hwy 200 LLC [RP]   |       | \$15,001 - \$50,000   | None           |                    | <input type="checkbox"/> |
| LOCATION: Locust , NC, US  |       |                       |                |                    |                          |
| Marsh & McLennan Companies, Inc. (MMC) [ST]                                | SP    | \$1,001 - \$15,000    | Dividends      | \$1 - \$200        | <input type="checkbox"/> |
| McHenry-McHenry partnership ⇒ Mortgage Held on 215 Robinson Road [DO]      |       | \$100,001 - \$250,000 | Interest       | \$5,001 - \$15,000 | <input type="checkbox"/> |
| McHenry-Putman Partnership [RP]  |       | \$15,001 - \$50,000   | Rent           | \$5,001 - \$15,000 | <input type="checkbox"/> |
| LOCATION: Gastonia, NC, US<br>DESCRIPTION: 109 W. 8th Ave                  |       |                       |                |                    |                          |
| McHenry-Putman Partnership [RP]  |       | \$15,001 - \$50,000   | Rent           | \$5,001 - \$15,000 | <input type="checkbox"/> |
| LOCATION: Gastonia, NC, US<br>DESCRIPTION: 5224 Union Rd                   |       |                       |                |                    |                          |
| Vanguard 529 College Savings Plan ⇒ Vanguard 529 College Savings Plan [5P] | DC    | \$250,001 - \$500,000 | Tax-Deferred   |                    | <input type="checkbox"/> |
| LOCATION: NV   |       |                       |                |                    |                          |

\* 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

None disclosed.

## SCHEDULE C: EARNED INCOME

| Source                            | Type          | Amount |
|-----------------------------------|---------------|--------|
| Federal Communications Commission | spouse salary | N/A    |

## SCHEDULE D: LIABILITIES

| Owner | Creditor        | Date Incurred | Type   | Amount of Liability   |
|-------|-----------------|---------------|--|-----------------------|
| SP    | JP Morgan Chase | Sepember 2012 | Mortgage on personal residence, Washington, DC | \$250,001 - \$500,000 |
|       | Wells Fargo     | October 2020  | Mortgage on personal residence, Denver,        | \$250,001 -           |

| <b>Owner</b> | <b>Creditor</b>     | <b>Date Incurred</b> | <b>Type</b>                                      | <b>Amount of Liability</b> |
|--------------|---------------------|----------------------|--|----------------------------|
|              |                     |                      | NC   | \$500,000                  |
| JT           | PenFed Credit Union | July 2021            | mortgage on personal residence in Washington, DC | \$1,000,001 - \$5,000,000  |

## SCHEDULE E: POSITIONS

| <b>Position</b>     | <b>Name of Organization</b> |
|---------------------|-----------------------------|
| Partner             | McHenry-Putman Partnership  |
| Sole Proprietor     | McHenry Real Estate         |
| COMMENTS: No assets |                             |
| Partner             | McHenry-McHenry partnership |

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Brattle Group Retirement Plan (Owner: SP)
- GW & Wade Asset Management (Owner: SP)
- McHenry-McHenry partnership (50% Interest)  
LOCATION: US
- Vanguard 529 College Savings Plan (Owner: DC)  
LOCATION: NV

## 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. Patrick T. McHenry , 05/16/2022