



Filing ID #10052159

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Scott Perry  
**Status:** Member  
**State/District:** PA10

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 08/10/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Adams County National Bank [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
American Funds ⇒ Capital Income Builder-A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ Capital World Growth & Income Fund-A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ Smallcap World Fund-A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ The Bond Fund of America-A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Empower Retirement 401(k) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
LPL Financial ⇒ American Balanced Cl A [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
LPL Financial ⇒ Insured Cash Account [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Members First Credit Union [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual [WU]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Pennsylvania 529 Guaranteed Savings Plan - Mattea [5P] LOCATION: PA		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Pennsylvania 529 Guaranteed Savings Plan - Ryenn [5P] LOCATION: PA		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Pennsylvania State Employees Credit Union [BA]	SP	\$100,001 - \$250,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Residential Rental - Dillsburg, PA [RP] LOCATION: Dillsburg/York, PA, US		\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Residential Rental - Harrisburg, PA [RP] LOCATION: Harrisburg/Dauphin, PA, US		\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
US Bank CDs [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard ⇒ 500 Index Fund Adm [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒ LifeStrategy Mod Growth [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒ Total Stock Mkt Idx Adm [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒ US Growth Investor CL [MF]	SP	\$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?
PA529 GSP - Mattea [5P] LOCATION: PA		08/31/2022		\$1,001 - \$15,000	
PA529 GSP - Ryenn [5P] LOCATION: PA		08/31/2022		\$1,001 - \$15,000	

\* 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
Penn State Health	spouse salary	N/A
Pennsylvania State Employees' Retirement System	state retirement	\$14,397.84
Doterra International LLC	spouse business income	\$1,171.81

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
Members 1st FCU		August 2021	Mortgage on Residential Rental - Harrisburg, PA	\$50,001 - \$100,000
Members 1st FCU		August 2021	Mortgage on Residential Rental - Dillsburg, PA	\$50,001 - \$100,000
Members First Federal Credit Union		September 2010	Mortgage on Personal Residence	\$100,001 - \$250,000
Members 1st FCU		September 2021	Land adjacent to primary residence	\$100,001 - \$250,000
Members 1st FCU		2021	Personal Line of Credit	\$10,000 - \$15,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
March 2013	Scott Perry and Pennsylvania State Employee Retirement System	Continued participation in the Pennsylvania State Employee Retirement System.

## 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?
Conservative Partnership Institute	02/10/2022	02/14/2022	Harrisburg, PA - Amelia Island, FL - Harrisburg, PA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Club for Growth	03/3/2022	03/4/2022	Harrisburg, PA - Palm Beach, FL - Harrisburg, PA	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

- American Funds (Owner: SP)
- LPL Financial
- Vanguard (Owner: SP)

## 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. Scott Perry , 08/10/2023