



Filing ID #10062561

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Robert J. Menendez
Status: Member
State/District: NJ08

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2022
Filing Date: 08/13/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Art.sy, Inc. [PS] DESCRIPTION: Private shares in former employer.	SP	Undetermined	None		
Artsy - 401(K) ⇒ Vanguard Target Retirement 2055 Fund - Investor Class (VFFVX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab - Brokerage ⇒ Charles Schwab Bank [BA]	JT	\$1,001 - \$15,000	None		
Charles Schwab - Brokerage ⇒ Schwab Fundamental U.S. Large Company Index ETF (FNDX) [EF]	JT	\$1,001 - \$15,000	None		
Charles Schwab - Brokerage ⇒ VANGUARD MUNI BND TAX EXEMPT ETF (VTEB) [EF]	JT	\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #1 ⇒ AT&T Inc. (T) [ST]		None	Dividends	Not Applicable	\$201 - \$1,000
Charles Schwab - Brokerage #1 ⇒ BlackRock Technology Opportunities Fund Investor A		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Shares (BGSAX) [MF]					
Charles Schwab - Brokerage #1 ⇒ NUVEEN HIGH YIELD MUNICIPAL BOND A (NHMAX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Charles Schwab - Brokerage #1 ⇒ NUVEEN NJ MUNICIPAL BOND A (NNJAX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Charles Schwab - Brokerage #1 ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #1 ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ Charles Schwab Cash [BA]		\$15,001 - \$50,000	Interest	Not Applicable	\$1 - \$200
Charles Schwab - Brokerage #2 ⇒ Invesco FTSE RAFI Developed Markets ex-U.S. (PXF) [EF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Charles Schwab - Brokerage #2 ⇒ Invesco FTSE RAFI Developed Markets ex-U.S. Small-Mid ETF (PDN) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ ISHARES GOLD ETF (IAU) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ iShares National Muni Bond ETF (MUB) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ SCHWAB EMERGING MARKETS EQUITY ETF (SCHE) [EF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ SCHWAB FUNDA EMG MKTS LARGE COM ETF (FNDE) [EF]		\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ SCHWAB FUNDAMENTAL INL LARGE COM ETF (FNDF) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SCHWAB FUNDAMENTAL INTL SMAL COM ETF (FNDC) [EF]					
Charles Schwab - Brokerage #2 ⇒ SCHWAB FUNDAMENTAL US LARGE CO ETF(FNDX) [EF]		\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ SCHWAB FUNDAMENTAL US SMALL COM ETF(FNDA) [EF]		\$15,001 - \$50,000	None		
Charles Schwab - Brokerage #2 ⇒ SCHWAB INTERNATIONAL EQUITY ETF (SCHF) [EF]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ Schwab U.S. REIT ETF (SCHH) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ SCHWAB US LARGE CAP ETF (SCHX) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ SCHWAB US SMALL CAP ETF (SCHA) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ SPDR BLOOMBG EMG MRKT LCL BND ETF (EBND) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ SPDR Portfolio TIPS ETF (SPIP) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$1,001 - \$2,500
Charles Schwab - Brokerage #2 ⇒ VANGUARD SMALL CAP ETF (VB) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ VGRD FTSE ALL WRLD EX USSML CAP ETF (VSS) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ XTRACKERS INTER REAL ESTETF (HAUZ) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - IRA Contributory ⇒ Charles Schwab Bank [BA]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab - IRA Contributory ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental Emerging Markets Large Company Index ETF (FNDE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental International Large Company Index ETF (FNDF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental International Small Company Index ETF (FNDC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental U.S. Large Company Index ETF (FNDX) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental U.S. Small Company Index ETF (FNDA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ SCHWAB INTERMEDIATE TERM US TRS ETF (SCHR) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab International Equity ETF (SCHF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ SCHWAB INTERNATNAL SMALLCAP EQY ETF (SCHC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ SCHWAB US TIPS ETF (SCHP) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
VANGUARD MORTGAGE BACKEDSEC ETF (VMBS) [EF]					
Charles Schwab Checking [BA]		\$15,001 - \$50,000	Interest	Not Applicable	\$1 - \$200
Charles Schwab Savings [BA]		\$1,001 - \$15,000	Interest	Not Applicable	\$1 - \$200
Chase Checking [BA]	SP	\$1,001 - \$15,000	Interest	Not Applicable	\$1 - \$200
Chase Savings [BA]	SP	\$1,001 - \$15,000	Interest	Not Applicable	\$1 - \$200
Goldman Sachs - Brokerage ⇒ FDIC Cash [BA]	SP	\$1,001 - \$15,000	None		
Goldman Sachs - Brokerage ⇒ iShares National Muni Bond ETF (MUB) [EF]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard Mid Cap ETF(VO) [EF]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard Small Cap ETF (VB) [EF]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$15,001 - \$50,000	Dividends	Not Applicable	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard Value ETF (VTV) [EF]	SP	\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Goldman Sachs - IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Lowenstein Sandler - Vanguard - 401(K) ⇒ Columbia Dividend Income Fund Institutional 3 Class (CDDYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Information Technology Index Fund Admiral Shares (VITAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Mid-Cap Index Fund Admiral Shares (VIMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Small-Cap Index Fund Admiral Shares (VSMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Target Retirement 2050 Trust II (VFIFX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Peek - 401(K) ⇒ Vanguard REIT Index Admiral (VGSLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Peek - 401(K) ⇒ Vanguard Total Bond Market Index Admiral (VBTLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Peek - 401(K) ⇒ Vanguard Total International Bond Index Admiral (VTABX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Peek - 401(K) ⇒ Vanguard Total International Stock Index Fund Admiral Shares (VTIAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Peek - 401(K) ⇒ Vanguard Total Stock Market Index Fund Admiral Shares (VTSAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Peek Travel, Inc. [OP] DESCRIPTION: Options in current company (vested and unvested) COMMENTS: 18,958 vested options	SP	Undetermined	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
Lowenstein Sandler LLP	Salary	N/A	\$327,197.94
Peek.com	Spouse Salary	N/A	N/A
Artsy.com	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Central Loan Administration & Reporting	June 2020	Mortgage on primary residence	\$500,001 - \$1,000,000
COMMENTS: Mortgage purchased by Central Loan Administration & Reporting from Citibank, N.A.				

SCHEDULE E: POSITIONS

Position	Name of Organization
Commissioner	Port Authority of New York and New Jersey
COMMENTS: Uncompensated position - resigned as of 1/3/2023	
Trustee	The Hudson School
COMMENTS: Uncompensated position - resigned as of 1/3/2023	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2023	Filer and Lowenstein Sandler LLP	Continuing participation in a defined contribution plan managed by former employer. Employer no longer contributes to the plan.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">Artsy - 401(K) (Owner: SP)Charles Schwab - Brokerage (Owner: JT)

LOCATION: US

- Charles Schwab - Brokerage #1
LOCATION: US
- Charles Schwab - Brokerage #2
LOCATION: US
- Charles Schwab - IRA Contributory
- Goldman Sachs - Brokerage (Owner: SP)
LOCATION: US
- Goldman Sachs - IRA (Owner: SP)
- Lowenstein Sandler - Vanguard - 401(K)
- Peek - 401(K) (Owner: SP)

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

COMMENTS

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. Robert J. Menendez , 08/13/2024