



Filing ID #10050909

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Alexander Xavier Mooney
Status: Member
State/District: WV02

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2021
Filing Date: 02/14/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|---------------------|----------------|--------|--------------------------|
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ AmFds Euro Pacfc Gr R6 [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ DE Val Inst [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Fid Puritan [MF] | | \$15,001 - \$50,000 | None | | <input type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Rssll Sm Cap Index [MF] | | \$15,001 - \$50,000 | None | | <input type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ SP 500 Index [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ SP Md Cap Index [MF] | | \$15,001 - \$50,000 | None | | <input type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ TRowe Price Mid Cap Val [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ TRowPr STRcdRsrch C [MF] | | None | None | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|---------------------|----------------|--------|-------------------------------------|
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ TRowPR StrcdRsrch CMN Tr [MF] | | \$1,001 - \$15,000 | None | | <input checked="" type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ WlmBlr Lg Cap Gr CIF 5 [MF] | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| TIAA Traditional [FN] | SP | \$15,001 - \$50,000 | None | | <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? |
|--|-------|------------|----------|---------------------|--------------------------|
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ AmFds Gr Fd Am R6 [MF] | | 02/16/2021 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Nationwide Fid 500 Index [MF] | | 08/17/2021 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Nationwide Fid 500 Index [MF] | | 08/17/2021 | P | \$1,001 - \$15,000 | |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Nationwide SP Mid Cap Index [MF] | | 08/17/2021 | P | \$15,001 - \$50,000 | |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Rssl SM Cap Index [MF] | | 08/17/2021 | P | \$1,001 - \$15,000 | |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ TRowPr StrcdRsrch C [MF] | | 12/16/2021 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ TRowPR StrcdRsrch CMN Tr [MF] | | 12/16/2020 | P | \$1,001 - \$15,000 | |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Vanguard Mid Cap Index [MF] | | 08/17/2021 | S | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Vanguard Small Cap Index [MF] | | 08/17/2021 | S | \$1,001 - \$15,000 | <input type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|----------|--------------------|---------------------|
| Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ WlmBlr Lg Cap Gr CIF 5 [MF] | | 02/16/2021 | P | \$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 |
|--------------------|---------------|--------|
| GGM Consulting LLC | Spouse Salary | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|------------------------------------|----------------|---|-----------------------|
| JT | Congressional Federal Credit Union | September 2017 | Mortgage on Primary Residence, Charles Town, WV | \$250,001 - \$500,000 |

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|--------------|----------------------------------|--------------------------------------|
| January 2006 | Myself and the State of Maryland | Legislative Pension Plan Participant |

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

| Trip Details | | | | | Inclusions | | |
|---|------------|------------|--|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Source | Start Date | End Date | Itinerary | Days at Own Exp. | Lodging? | Food? | Family? |
| US/Georgia Friendship Association | 09/5/2021 | 09/9/2021 | Rome, Italy - Tblisi, Georgia - Dulles, VA | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| COMMENTS: The member and family member traveled separately to Rome on own funds | | | | | | | |
| Conservative Partnership Institute | 02/11/2021 | 02/13/2021 | Washington, D.C. - Miami, FL - Charles | 0 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Maryland Supplemental Retirement Plan (401k) (Nationwide)

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. Alexander Xavier Mooney , 02/14/2023