



Filing ID #10060014

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Susan Copius Altman
Status: Congressional Candidate
State/District: NJ07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 08/13/2024
Period Covered: 01/01/2023– 07/14/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Mutual Fund, Class F-2 Shares (AMRFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Community Labor Administrative Services 401K ⇒ American Mutual Fund, Class R-3 Shares (RMFCX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Community Labor Administrative Services 401K ⇒ BNY Mellon Midcap Index Fund, Inc. Investor Shares (PESPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Community Labor Administrative Services 401K ⇒ Federated Hermes Corporate Bond Fund Class A (FDBAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Community Labor Administrative Services 401K ⇒ Federated Hermes International Leaders Fund Class A (FGFAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Community Labor Administrative Services 401K ⇒ T. Rowe Price Growth Stock Fund-R Class (RRGSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Community Labor Administrative Services 401K ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
T. Rowe Price Retirement 2020 Fund (TRRBX) [MF]					
Community Labor Administrative Services 401K ⇒ Templeton Global Bond Fund Class A (TPINX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity 500 Index Fund (FXAIX) [MF]		None	Capital Gains, Dividends	None	\$201 - \$1,000
Fidelity Cash Reserves (FDRXX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity Emerging Markets Index Fund (FPADX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Fidelity Government Money Market Fund (SPAXX) [MF]		None	Dividends	\$1 - \$200	\$1,001 - \$2,500
Fidelity Growth Company Fund Retail Class (FDGRX) [MF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Fidelity Intermediate Municipal Income Fund (FLTMX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity International Index Fund (FSPSX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Fidelity Large Cap Stock Fund (FLCSX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Fidelity Mid Cap Index Fund (FSMDX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Fidelity SAI Conservative Income Municipal Bond Fund (FSMJX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Fidelity SAI Emerging Markets Value Index Fund (FEMVX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Fidelity SAI Municipal Income Fund (FSMNX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Fidelity Small Cap Index Fund (FSSNX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Franklin New Jersey Tax-Free Income Fund Class Advisor (FNJZX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Hartford Core Equity Fund Class R6 (HAITX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
iShares Core S&P Mid-Cap ETF (IJH) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
iShares MSCI EAFE Value ETF (EFV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
iShares MSCI Intl Value Factor ETF (IVLU) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
iShares MSCI USA Quality Factor ETF (QUAL) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
iShares National Muni Bond ETF (MUB) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
iShares U.S. Treasury Bond ETF (GOVT) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
MFS Institutional Investors Trust - MFS Institutional International Eq (MIEIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
New Jersey Alternate Benefit Program ⇒ BlackRock Ultra Short-Term Bond ETF (ICSH) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Roth IRA ⇒ Fidelity Asset Manager 70% (FASGX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Roth IRA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Spahn & Rose Lumber Co. [PS]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
DESCRIPTION: Retail lumber					
T. Rowe Price Large-Cap Growth Fund Class I (TRLGX) [MF]		\$1,001 - \$15,000	Capital Gains	None	\$2,501 - \$5,000
T. Rowe Price Mid-Cap Growth Fund, Inc. (RPMGX) [MF]		\$1 - \$1,000	Capital Gains, Dividends	None	\$201 - \$1,000
Traditional IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Adobe Inc. - Common Stock (ADBE) [ST]					
Traditional IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Air Products and Chemicals, Inc. Common Stock (APD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Amcor plc Ordinary Shares (AMCR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ American Express Company Common Stock (AXP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ Applied Materials, Inc. - Common Stock (AMAT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Automatic Data Processing, Inc. - Common Stock (ADP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ AutoZone, Inc. Common Stock (AZO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Bank of America Corporation Common Stock (BAC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Traditional IRA ⇒ Booking Holdings Inc. - Common Stock (BKNG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Caterpillar, Inc. Common Stock (CAT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Chubb Limited Common Stock (CB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Cummins Inc. Common Stock (CMI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Elevance Health, Inc. Common Stock (ELV) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Emerson Electric Company Common Stock (EMR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Fair Isaac Corproation Common Stock (FICO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ FDIC Bank Deposit Sweep [IH]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Fiserv, Inc. Common Stock (FI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Freeport-McMoRan, Inc. Common Stock (FCX) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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Traditional IRA ⇒ Goldman Sachs Group, Inc. (GS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Illinois Tool Works Inc. Common Stock (ITW) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Intel Corporation - Common Stock (INTC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ International Business Machines Corporation Common Stock (IBM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Intuit Inc. - Common Stock (INTU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ IQVIA Holdings, Inc. Common Stock (IQV) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Keurig Dr Pepper Inc. (KDP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ KLA Corporation - Common Stock (KLAC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Lowe's Companies, Inc. Common Stock (LOW) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Marsh & McLennan Companies, Inc. Common Stock (MMC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Mastercard Incorporated Common Stock (MA) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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Traditional IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Mettler-Toledo International, Inc. Common Stock (MTD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Traditional IRA ⇒ Morgan Stanley Common Stock (MS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Norfolk Southern Corporation Common Stock (NSC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Oracle Corporation Common Stock (ORCL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Otis Worldwide Corporation Common Stock (OTIS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ PACCAR Inc. - Common Stock (PCAR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Progressive Corporation (PGR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ QUALCOMM Incorporated - Common Stock (QCOM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Roper Technologies, Inc. (ROP) [ST]		\$1,001 - \$15,000	Tax-Deferred		

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Traditional IRA ⇒ S&P Global Inc. Common Stock (SPGI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Salesforce, Inc. Common Stock (CRM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Texas Instruments Incorporated - Common Stock (TXN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ The Cigna Group Common Stock (CI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ TJX Companies, Inc. (TJX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ T-Mobile US, Inc. (TMUS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Union Pacific Corporation Common Stock (UNP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Walmart Inc. Common Stock (WMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Traditional IRA ⇒ Waste Management, Inc. Common Stock (WM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Traditional IRA ⇒ Wells Fargo & Company Common Stock (WFC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Truist Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Victory Sycamore Established Value Fund Class I (VEVIX) [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000

* 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
New Jersey Working Families Alliance	Salary	\$37,187.50	\$122,258.28

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Executive Director	New Jersey Working Families Alliance
Board of Directors	New Jersey Citizen Action
Chairman	Camden County Democratic Committee, Inc.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

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- Community Labor Administrative Services 401K
- New Jersey Alternate Benefit Program
- Roth IRA
- Traditional IRA

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: Susan Copius Altman , 08/13/2024