



Filing ID #10061186

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2022  
**Filing Date:** 05/14/2024

## 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]		\$1 - \$1,000	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 ⇒ SPDR Gold TR Gold SHS [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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					
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					
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					

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Brattle Group Retirement Plan ⇒ Vanguard Total Bond Market Index Investor Shares (VBMFX) [MF]	SP	02/10/2022	E	\$15,001 - \$50,000	
DESCRIPTION: Fund to fund transfer within spouse's retirement account.					

\* 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
Federal Communications Commission	spouse salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo	October 2020	Mortgage on personal residence, Denver, NC	\$250,001 - \$500,000
JT	PenFed Credit Union	July 2021	mortgage on personal residence in Washington, DC	\$1,000,001 - \$5,000,000
JT	Congressional Federal Credit Union	September 2022	Home equity line of credit on Denver, NC home	Over \$50,000,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
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

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Enterprise Institute	03/10/2022	03/12/2022	Washington, DC - Sea Island, GA - Washington, DC	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 INVESTMENT VEHICLE DETAILS

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- 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 , 05/14/2024