



Filing ID #10037421

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/10/2020

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 Prime Money Market Fund (VMMXX) [MF]	SP	None	Tax-Deferred		<input type="checkbox"/>
Brattle Group Retirement Plan ⇒ Vanguard Target Retirement 2045 (VITVX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Brattle Group Retirement Plan ⇒ Vanguard Total Bond Market Index Investor Shares (VBMFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Congressional FCU checking [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Congressional FCU Money Market Account [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
GW & Wade Asset Managment ⇒ Fidelity Government Cash Reserves [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
GW & Wade Asset Managment ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Franklin Utilities Class A [MF]					
GW & Wade Asset Managment ⇒ MFS International Value Fund Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Locust -Hwy 200 LLC [RP] LOCATION: Locust , NC, US					
		\$15,001 - \$50,000	None		<input type="checkbox"/>
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]					
		None	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
McHenry-McHenry Partnership [RP] LOCATION: Gastonia, NC, US DESCRIPTION: 215 Robinson Road					
		None	None		<input type="checkbox"/>
McHenry-Putman Partnership [RP] LOCATION: Gastonia, NC, US DESCRIPTION: 109 W. 8th Ave					
		\$15,001 - \$50,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
McHenry-Putman Partnership [RP] LOCATION: Gastonia, NC, US DESCRIPTION: 5224 Union Rd					
		\$15,001 - \$50,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
SCANA Corporation (SCG) [ST]					
		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard 529 College Savings Plan ⇒ Vanguard 529 College Savings Plan [5P] LOCATION: NV					
	DC	\$250,001 - \$500,000	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?
McHenry-McHenry partnership ⇒ 215 Robinson Road [RP]		09/12/2019	S	\$250,001 - \$500,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LOCATION: Gastonia, NC, US					

* 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
Federal Communications Commission	spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Mr. and Mrs. George Lecroy	March 2003	Mortgage on 215 Robinson Road, Gastonia, NC	\$10,000 - \$15,000
SP	JP Morgan Chase	Sepember 2012	Mortgage on personal residence, Washington, DC	\$250,001 - \$500,000
	South State Bank	May 2012	Mortgage on personal residence, Denver, NC	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Partner	McHenry-McHenry partnership
Partner	McHenry-Putman Partnership
Sole Proprietor	McHenry Real Estate
COMMENTS: No assets	

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Brattle Group Retirement Plan (Owner: SP)
- GW & Wade Asset Managment (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 , 08/10/2020