



Filing ID #10049964

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Claudia Tenney  
**Status:** Member  
**State/District:** NY22

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 07/12/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset                                                                                      | Owner | Value of Asset       | Income Type(s)           | Income            | Tx. > \$1,000?                      |
|--------------------------------------------------------------------------------------------|-------|----------------------|--------------------------|-------------------|-------------------------------------|
| Adirondeck Financial Services Invest Acct ⇒ Dodge & Cox Income Fund [MF]                   |       | \$1,001 - \$15,000   | Dividends                | \$201 - \$1,000   | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ Dodge and Cox International Fund (MF) [MF]     |       | \$15,001 - \$50,000  | Capital Gains, Dividends | \$201 - \$1,000   | <input checked="" type="checkbox"/> |
| Adirondeck Financial Services Invest Acct ⇒ Dreyfus Ins Deposit Program [BA]               |       | \$50,001 - \$100,000 | Interest                 | \$1 - \$200       | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ Europacific Gwth Fd Cl-F-2 (MF) [MF]           |       | \$15,001 - \$50,000  | Capital Gains, Dividends | \$1,001 - \$2,500 | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ iShares TR Russell 2000ETF (EF) [BA]           |       | \$1,001 - \$15,000   | Dividends                | \$201 - \$1,000   | <input checked="" type="checkbox"/> |
| Adirondeck Financial Services Invest Acct ⇒ iShares TR Russell Mid-Cap ETF (EF) [EF]       |       | \$15,001 - \$50,000  | Capital Gains, Dividends | \$1,001 - \$2,500 | <input checked="" type="checkbox"/> |
| Adirondeck Financial Services Invest Acct ⇒ Metropolitan West Ttl Ret Bd Fund CL 1 [MF]    |       | \$1,001 - \$15,000   | Dividends                | \$1 - \$200       | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ Metropolitan West Unconstrained BdFd (MF) [MF] |       | \$15,001 - \$50,000  | Dividends                | \$1,001 - \$2,500 | <input type="checkbox"/>            |

| Asset                                                                                      | Owner | Value of Asset        | Income Type(s) | Income              | Tx. > \$1,000?                      |
|--------------------------------------------------------------------------------------------|-------|-----------------------|----------------|---------------------|-------------------------------------|
| Adirondeck Financial Services Invest Acct ⇒ MFS Growth Fund CL 1 (MF) [MF]                 |       | \$15,001 - \$50,000   | Capital Gains  | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Adirondeck Financial Services Invest Acct ⇒ OakMark Fund Investor Class Fund (MF) [BA]     |       | \$15,001 - \$50,000   | Dividends      | \$201 - \$1,000     | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ SPDR Gold Tr Gold Shs [EF]                     |       | \$1,001 - \$15,000    | Dividends      | None                | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ Vanecck Vectors ETF Tr Gold MINers [EF]        |       | \$1,001 - \$15,000    | Dividends      | \$1 - \$200         | <input checked="" type="checkbox"/> |
| Adirondeck Financial Services Invest Acct ⇒ Vanguard Index FDS S & P 500 ETF Shs (EF) [EF] |       | \$100,001 - \$250,000 | Dividends      | \$1,001 - \$2,500   | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ Vanguard S-T Investment Grade Fd (MF) [BA]     |       | \$15,001 - \$50,000   | Dividends      | \$201 - \$1,000     | <input type="checkbox"/>            |
| Bank of Utica BA [BA]                                                                      |       | \$1,001 - \$15,000    | Interest       | \$201 - \$1,000     | <input type="checkbox"/>            |
| Mid_York Press Inc. 401K account ⇒ American Funds Europacific (EF) [BA]                    |       | \$15,001 - \$50,000   | Tax-Deferred   |                     | <input type="checkbox"/>            |
| Mid_York Press Inc. 401K account ⇒ American Funds Growth Fund (EF) [PE]                    |       | \$100,001 - \$250,000 | Tax-Deferred   |                     | <input type="checkbox"/>            |
| Mid_York Press Inc. 401K account ⇒ BMO Small-Cap Value Fund (EF) [PE]                      |       | \$15,001 - \$50,000   | Tax-Deferred   |                     | <input type="checkbox"/>            |
| Mid_York Press Inc. 401K account ⇒ Prudential High Yield Fund (EF) [PE]                    |       | \$15,001 - \$50,000   | Tax-Deferred   |                     | <input type="checkbox"/>            |
| Mid_York Press Inc. 401K account ⇒ Vanguard 500 Idx Fund Adm [PE]                          |       | \$100,001 - \$250,000 | Tax-Deferred   |                     | <input type="checkbox"/>            |
| Mid_York Press Inc. 401K account ⇒ Vanguard Mid-Cap Index Fund Adm (EF) [PE]               |       | \$15,001 - \$50,000   | Tax-Deferred   |                     | <input type="checkbox"/>            |
| Mid_York Press Inc. 401K account ⇒ Voya Intermediate Bond Fund (EF) [PE]                   |       | \$15,001 - \$50,000   | Tax-Deferred   |                     | <input type="checkbox"/>            |
| Morgan Stanley Investment Acct ⇒                                                           |       | \$1,001 - \$15,000    | Capital Gains, | \$201 - \$1,000     | <input type="checkbox"/>            |

| Asset                                                                  | Owner | Value of Asset       | Income Type(s)              | Income          | Tx. > \$1,000?           |
|------------------------------------------------------------------------|-------|----------------------|-----------------------------|-----------------|--------------------------|
| Clearbridge Apprec. C (MF) [BA]                                        |       |                      | Dividends                   |                 |                          |
| Morgan Stanley Investment Acct ⇒ Clearbridge Appreciation A (EF) [BA]  |       | \$1,001 - \$15,000   | Capital Gains,<br>Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Morgan Stanley Investment Acct ⇒ Morgan Stanley Bank NA (BA) [BA]      |       | \$1,001 - \$15,000   | None                        |                 | <input type="checkbox"/> |
| Morgan Stanley Trad. IRA ⇒ Berkshire Hathaway CL B New (MF) [BA]       |       | \$1,001 - \$15,000   | Tax-Deferred                |                 | <input type="checkbox"/> |
| Morgan Stanley Trad. IRA ⇒ Clearbridge Aggressive Growth Fd (EF) [BA]  |       | \$15,001 - \$50,000  | Tax-Deferred                |                 | <input type="checkbox"/> |
| Morgan Stanley Trad. IRA ⇒ Clearbridge Appreciation A (EF) [BA]        |       | \$15,001 - \$50,000  | Tax-Deferred                |                 | <input type="checkbox"/> |
| Morgan Stanley Trad. IRA ⇒ Clearbridge International Value A (EF) [BA] |       | \$1,001 - \$15,000   | Tax-Deferred                |                 | <input type="checkbox"/> |
| Morgan Stanley Trad. IRA ⇒ Clearbridge Value Trust A (EF) [BA]         |       | \$50,001 - \$100,000 | 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?                 |
|---------------------------------------------------------------------------------|-------|------------|----------|---------------------|-------------------------------------|
| Adirondeck Financial Services Invest Acct ⇒ Dodge & Cox International Fund [MF] |       | 01/19/2021 | S        | \$1,001 - \$15,000  | <input checked="" type="checkbox"/> |
| Adirondeck Financial Services Invest Acct ⇒ Global X Fds X Silver [MF]          |       | 12/6/2021  | S        | \$1,001 - \$15,000  | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ Ishares Tr Russell 2000 [MF]        |       | 01/19/2021 | S        | \$1,001 - \$15,000  | <input checked="" type="checkbox"/> |
| Adirondeck Financial Services Invest Acct ⇒ Ishares Tr Russell M [MF]           |       | 11/30/2021 | S        | \$1,001 - \$15,000  | <input checked="" type="checkbox"/> |
| Adirondeck Financial Services Invest Acct ⇒                                     |       | 11/30/2021 | S        | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |

| Asset                                                                       | Owner | Date       | Tx. Type | Amount             | Cap. Gains > \$200?                 |
|-----------------------------------------------------------------------------|-------|------------|----------|--------------------|-------------------------------------|
| MFS Growth Fund Class [MF]                                                  |       |            |          |                    |                                     |
| Adirondeck Financial Services Invest Acct ⇒ Oakmark Fund Investor [MF]      |       | 11/30/2021 | S        | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Adirondeck Financial Services Invest Acct ⇒ SPDR Gold Tr Shares [MF]        |       | 12/6/2021  | S        | \$1,001 - \$15,000 | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ SPDR Gold Trust (GLD) [MF]      |       | 05/20/2021 | S        | \$1,001 - \$15,000 | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ Van Eck ETF Gold Miners [MF]    |       | 12/6/2021  | S        | \$1,001 - \$15,000 | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ Van Eck Vectors ETF [MF]        |       | 05/20/2021 | S        | \$1,001 - \$15,000 | <input type="checkbox"/>            |
| Adirondeck Financial Services Invest Acct ⇒ Vanguard Index Fds S&P 500 [MF] |       | 07/8/2021  | S        | \$1,001 - \$15,000 | <input checked="" 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 C: EARNED INCOME

| Source                      | Type  | Amount       |
|-----------------------------|-------|--------------|
| OMP Park                    | Wages | \$6,000.00   |
| Mid York Press              | Wages | \$25,579.00  |
| US House of Representatives | Wages | \$154,997.00 |

## SCHEDULE D: LIABILITIES

| Owner | Creditor     | Date Incurred | Type          | Amount of Liability  |
|-------|--------------|---------------|---------------|----------------------|
|       | Key Bank, NA | April 2013    | Home Mortgage | \$50,001 - \$100,000 |

## SCHEDULE E: POSITIONS

None disclosed.

## **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**

- Adirondeck Financial Services Invest Acct  
LOCATION: US  
DESCRIPTION: Adirondeck Financial Investment Acct
- Mid\_York Press Inc. 401K account
- Morgan Stanley Investment Acct  
LOCATION: US
- Morgan Stanley Trad. IRA  
DESCRIPTION: Morgan Stanley Traditional IRA

## **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. Claudia Tenney , 07/12/2022