



Filing ID #10029655

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Claudia Tenney
Status: Congressional Candidate
State/District: NY22

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 01/29/2020
Period Covered: 01/01/2018– 12/31/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Adirondeck Financial Services Invest Acct ⇒ American Beacon Large Cap Value [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Adirondeck Financial Services Invest Acct ⇒ AMG Managers Fairpointe Mid Cap [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Adirondeck Financial Services Invest Acct ⇒ Dodge & Cox Income Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Adirondeck Financial Services Invest Acct ⇒ Dodge & Cox International Fund [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Adirondeck Financial Services Invest Acct ⇒ Dreyfus Ins Deposit Program [BA]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Adirondeck Financial Services Invest Acct ⇒		\$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
Europacific Grwth Fd CL A [MF]					
Adirondeck Financial Services Invest Acct ⇒ Europacific Gwth Fd CL F-2 [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Adirondeck Financial Services Invest Acct ⇒ Fidelity Small Cap Discovery Fund [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Adirondeck Financial Services Invest Acct ⇒ Invesco American Value Fund [BA]		None	Capital Gains, Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Adirondeck Financial Services Invest Acct ⇒ iShares TR Russell 2000ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Adirondeck Financial Services Invest Acct ⇒ iShares TR Russell Mid-Cap ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Adirondeck Financial Services Invest Acct ⇒ Metropolitan West Total Return Bond Fd [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Adirondeck Financial Services Invest Acct ⇒ Metropolitan West Unconstrained Bd Fd [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Adirondeck Financial Services Invest Acct ⇒ MFS Growth Fund CL I [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Adirondeck Financial Services Invest Acct ⇒ OakMark Fund Investor Class Fund [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Adirondeck Financial Services Invest Acct ⇒ Templeton Global Bond Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Adirondeck Financial Services Invest Acct ⇒ Vanguard Index FDS S & P 500 ETF Shs		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[EF]					
Adirondeck Financial Services Invest Acct ⇒ Vanguard S-T Investment Grade Fd [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Bank of Utica [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Mid_York Press Inc. 401K account ⇒ American Funds Europacific [EF] DESCRIPTION: American Funds EuroPacific		\$15,001 - \$50,000	Tax-Deferred		
Mid_York Press Inc. 401K account ⇒ American Funds Growth Fnd [EF] DESCRIPTION: American Funds Growth Fnd		\$50,001 - \$100,000	Tax-Deferred		
Mid_York Press Inc. 401K account ⇒ BMO Small-Cap value Fund [EF] DESCRIPTION: BMO Small-Cap value Fund		\$15,001 - \$50,000	Tax-Deferred		
Mid_York Press Inc. 401K account ⇒ Prudential High Yield Fund [EF] DESCRIPTION: Prudential High Yield Fund		None	Tax-Deferred		
Mid_York Press Inc. 401K account ⇒ Vanguard Midcap Index Fund Adm [EF] DESCRIPTION: Vanguard Midcap Index Fund Adm		\$1,001 - \$15,000	Tax-Deferred		
Mid_York Press Inc. 401K account ⇒ Voya Corporate Ldrs 100Fd [EF] DESCRIPTION: Voya Corporate Ldrs 100Fd		\$50,001 - \$100,000	Tax-Deferred		
Mid_York Press Inc. 401K account ⇒ Voya Intermediate Bond Fund [EF] DESCRIPTION: Voya Intermediate Bond Fund		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Investment Acct ⇒ Clearbridge Apprec C [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Investment Acct ⇒ Clearbridge Appreciation A [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Morgan Stanley Investment Acct ⇒ Clearbridge Appreciation C [EF]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley Investment Acct ⇒ Morgan Stanley Bank NA [BA]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Trad. IRA ⇒ Berkshire Hathaway CL B New [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Trad. IRA ⇒ Clearbridge Aggressive Grwth Fd [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Trad. IRA ⇒ Clearbridge Appreciation A [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Trad. IRA ⇒ Clearbridge Intl Value A [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Trad. IRA ⇒ Clearbridge Value Trust A [EF]		\$15,001 - \$50,000	Tax-Deferred		

* 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 Current Year to Filing	Amount Preceding Year
Mid-York Press Inc	Salary	\$21,879.00	\$20,442.00
OMP Park Inc	Salary	\$32,000.00	N/A
US House of Representatives	salary	N/A	\$174,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Key Bank NA	April 2013	home mortgage	\$50,001 - \$100,000
	Community Bank NA	September 2017	Auto Loan	\$15,001 - \$50,000
	Americu Credit Union	August 2015	Motorcycle loan	\$2,600.00

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A 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

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 , 01/29/2020