



# 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:** 2020  
**Filing Date:** 07/29/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alliance Bank and Trust [PS] <small>DESCRIPTION: Stock in NC bank; available for public purchase but not publicly traded</small>		\$1 - \$1,000	None		<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]		\$50,001 - \$100,000	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	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
GW & Wade Asset Managment ⇒ Franklin Utilities Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
GW & Wade Asset Management ⇒ MFS International Value Fund Class A [MF]	SP	None	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Asset was sold.					
GW & Wade Asset Management ⇒ SPDR Gold TR Gold SHS [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
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					
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]	DC	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: NV					

\* 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?
Dominion Energy, Inc. (D) [ST]		11/19/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sale of shares in Dominion Energy, Inc.					

\* 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
SP	JP Morgan Chase	September 2012	Mortgage on personal residence, Washington, DC	\$250,001 - \$500,000
	Wells Fargo	October 2020	Mortgage on personal residence, Denver, NC	\$250,001 - \$500,000

### 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

None disclosed.

### SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

### SCHEDULE A AND B ASSET CLASS DETAILS

- o Brattle Group Retirement Plan (Owner: SP)
- o 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 , 07/29/2021