



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Matthew Putorti  
**Status:** Congressional Candidate  
**State/District:** NY21

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 10/12/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 Account for Child 1 ⇒ Vanguard Total Bond Market II Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
529 Account for Child 1 ⇒ Vanguard Total International Bond Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
529 Account for Child 1 ⇒ Vanguard Total International Stock Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
529 Account for Child 1 ⇒ Vanguard Total Stock Market Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
529 Account for Child 2 ⇒ Vanguard Total Bond Market II Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
529 Account for Child 2 ⇒ Vanguard Total International Bond Index Fund [MF]		\$1 - \$1,000	Tax-Deferred		
529 Account for Child 2 ⇒ Vanguard Total International Stock Index Fund		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
[MF]					
529 Account for Child 2 ⇒ Vanguard Total Stock Market Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series All-Sector Equity Fund [MF]		\$1 - \$1,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Blue Chip Growth Fund [MF]		\$1 - \$1,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Canada Fund [MF]		\$1 - \$1,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Commodity Strategy Fund [MF]		\$1 - \$1,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Emerging Markets Fund [MF]		\$1 - \$1,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Emerging Markets Opportunities Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Growth Company Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Inflation-Protected Bond Index Fund [MF]		\$1 - \$1,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series International Growth Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series International Small Cap Fund [MF]		\$1 - \$1,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series International Value Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Intrinsic Opportunities Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Large Cap Stock Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
AK Profit Sharing 401k ⇒ Fidelity Series Large Cap Value Index Fund [MF]		\$1 - \$1,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Long-Term Treasury Bond Index Fund [MF]		\$1 - \$1,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Opportunistic Insights Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Overseas Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Small Cap Discovery Fund [MF]		\$1 - \$1,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Small Cap Opportunities Fund [MF]		\$1 - \$1,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Stock Selector Large Cap Value Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
AK Profit Sharing 401k ⇒ Fidelity Series Value Discovery Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Bank of America Savings Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Irrevocable Trust ⇒ Whitehall Property [RP]		\$100,001 - \$250,000	None		
LOCATION: Whitehall, NY, US					
DESCRIPTION: Co-trustee of irrevocable trust holding one piece of real property.					
Pillsbury Winthrop Shaw Pittman LLP Retirement Savings Plan 401k ⇒ FIAM TD LT Treas Idx CP-A [EF]		\$1,001 - \$15,000	Tax-Deferred		
Pillsbury Winthrop Shaw Pittman LLP Retirement Savings Plan 401k ⇒ FIAM US Bond Index [EF]		\$15,001 - \$50,000	Tax-Deferred		
Pillsbury Winthrop Shaw Pittman LLP Retirement Savings Plan 401k ⇒ Spartan Global ex US Index Pool - Class A [EF]		\$50,001 - \$100,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Pillsbury Winthrop Shaw Pittman LLP Retirement Savings Plan 401k ⇒ Spartan Total Market Index Pool - Class A [EF]		\$100,001 - \$250,000	Tax-Deferred		
Wealthfront Investment Account ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		\$1,001 - \$15,000	Dividends	\$2,501 - \$5,000	\$1 - \$200
Wealthfront Investment Account ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		\$1,001 - \$15,000	Dividends	None	None
Wealthfront Investment Account ⇒ iShares ESG Aware MSCI EM ETF (ESGE) [EF]		\$1 - \$1,000	Dividends	None	None
Wealthfront Investment Account ⇒ iShares ESG Aware MSCI USA ETF (ESGU) [EF]		\$1,001 - \$15,000	Dividends	None	None
Wealthfront Investment Account ⇒ Schwab International Equity ETF (SCHF) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Wealthfront Investment Account ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Wealthfront Investment Account ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]		\$1 - \$1,000	Dividends	None	\$1 - \$200
Wealthfront Investment Account ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Wealthfront Investment Account ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	None
Wealthfront Investment Account ⇒ Vanguard Energy ETF (VDE) [EF]		\$1 - \$1,000	Dividends	None	\$1 - \$200
Wealthfront Investment Account ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Wealthfront Investment Account ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		\$1,001 - \$15,000	Dividends	\$5,001 - \$15,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wealthfront Investment Account ⇒ Vanguard Tax-Exempt Bond ETF (VTEB) [EF]		\$1,001 - \$15,000	Dividends	None	None
Wealthfront Investment Account ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

\* 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
Pillsbury Winthrop Shaw Pittman LLP	Salary	\$194,211.44	\$441,319.24

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
Treasurer	Lesbian & Gay Law Assoc. Foundation of Greater NY and Bar Assoc. for Human Rights of Greater NY
COMMENTS: Uncompensated	

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
July 2021	Pillsbury Winthrop Shaw Pittman LLP and Matthew Putorti	Continuing participation in former employer's healthcare plan through COBRA.
July 2021	Pillsbury Winthrop Shaw Pittman LLP Retirement Savings Plan and Matthew Putorti	Continuing participation in former employer's retirement plan.
January 2015	AK Profit Sharing and Matthew Putorti	Continuing participation in former employer's retirement plan.

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

None disclosed.

### SCHEDULE A ASSET CLASS DETAILS

- 529 Account for Child 1  
LOCATION: NY
- 529 Account for Child 2  
LOCATION: NY
- AK Profit Sharing 401k
- Irrevocable Trust
- Pillsbury Winthrop Shaw Pittman LLP Retirement Savings Plan 401k
- Wealthfront Investment Account  
LOCATION: US

## 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:** Matthew Putorti , 10/12/2021