



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Monica Tranel  
**Status:** Congressional Candidate  
**State/District:** MToo

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 08/24/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Joint Investments ⇒ 529s [5P]  LOCATION: ME	JT	\$250,001 - \$500,000	Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Joint Investments ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Airbnb, Inc. - Class A (ABNB) [ST]	JT	\$15,001 - \$50,000	None		
Joint Investments ⇒ Amazon.com, Inc. (AMZN) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Investments ⇒ AMBFX [MF]	JT	\$50,001 - \$100,000	Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Joint Investments ⇒ Apple Inc. (AAPL) [ST]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Joint Investments ⇒ ASPZX [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000

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Joint Investments ⇒ Comm Services Select [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Joint Investments ⇒ Consumer Discretionary SPDR [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Joint Investments ⇒ Costco Wholesale Corporation (COST) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Investments ⇒ DBLTX [MF]	JT	\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Joint Investments ⇒ Eaton Vance Tax-Advantaged Global Dividend Income Fund Common Shares of Beneficial Interest (ETG) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ EIFAX [MF]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ EILTX [MF]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ Eli Lilly and Company (LLY) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Investments ⇒ First Trust Cloud Computing ETF (SKYY) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ First Trust DJ Internet Index Fund (FDN) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ First Trust Morningstar ETF (FDL) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Investments ⇒ Health Care Select [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

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Joint Investments ⇒ iShares Biotechnology ETF (IBB) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ iShares Core S&P U.S. Value ETF (IUSV) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ iShares U.S. Regional Banks ETF (IAT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ Materials Select Sector SPDR (XLB) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ Morgan Stanley Emerging Markets Domestic Debt Fund, Inc. Morgan Stanley Emerging Markets Domestic De (EDD) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ MWTIX [MF]	JT	\$250,001 - \$500,000	Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
Joint Investments ⇒ NEMIX [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Joint Investments ⇒ Nuveen AMT-Free Quality Municipal Income Fund Common Shares of Beneficial Interest Par Value \$.01 (NEA) [ST]	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
Joint Investments ⇒ Ormat Technologies, Inc. (ORA) [ST]	JT	\$50,001 - \$100,000	Dividends	None	None
Joint Investments ⇒ Pacer Benchmark Data & Infrastructure Real Estate SCTR ETF (SRVR) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Investments ⇒ Pfizer, Inc. (PFE) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ PIUHX [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000

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Joint Investments ⇒ PONPX [MF]	JT	\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Joint Investments ⇒ ProShares Online Retail ETF (ONLN) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Investments ⇒ SGENX [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ SGIIX [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Joint Investments ⇒ SGOIX [MF]	JT	\$15,001 - \$50,000	Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Joint Investments ⇒ SHSSX [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Investments ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ SPDR Select Sector Fund - Industrial (XLI) [ST]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Joint Investments ⇒ Vanguard Financial [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Joint Investments ⇒ Vanguard Information Tech ETF [EF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Joint Investments ⇒ Visa Inc. (V) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Joint Investments ⇒ YAFIX [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000

\* 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
Tranel Law Firm, PC	Salary	\$25,000.00	\$50,000.00
Missoula Anaesthesiology	Salary	N/A	N/A

#### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Bank of America	February 2021	Mortgage	\$500,001 - \$1,000,000

#### SCHEDULE E: POSITIONS

None disclosed.

#### SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Clearway (San Francisco, CA, US)	Legal Services
Building Energy USA (Washington, DC, US)	Legal Services
Powerex Corporation (Vancouver, CA)	Legal Services
Northern Telephone Cooperative (Sunburst, MT, US)	Legal Services
AquaFlo LLC (Helena, MT, US)	Legal Services
Two Dot Wind LLC (Billings, MT, US)	Legal Services
WINData LLC (Great Falls, MT, US)	Legal Services
Seventus (Chicago, IL, US)	Legal Services
NorthWest Fiber (Kirkland, WA, US)	Legal Services
Pattern Renewable (San Francisco, CA, US)	Legal Services
Wilfred and Cheri Doll (Malta, MT, US)	Legal Services

#### SCHEDULE A ASSET CLASS DETAILS

- Joint Investments (Owner: JT)  
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:** Monica Tranel , 08/24/2021