



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Josh Riley  
**Status:** Congressional Candidate  
**State/District:** NY22

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2021  
**Filing Date:** 05/17/2022  
**Period Covered:** 01/01/2020–12/31/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset   | Owner | Value of Asset        | Income Type(s)  | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|-----------------|-------------------------------|-----------------------|
| 92 Rainey Group LLC [OL]<br><br>LOCATION: Austin, TX, US<br>DESCRIPTION: Profit interest.   |       | None                  | Profit Interest | \$15,001 - \$50,000           | \$201 - \$1,000       |
| FIDELITY BLUE CHIP GROWTH [MF]  |       | \$250,001 - \$500,000 | Dividends       | None                          | \$15,001 - \$50,000   |
| FIDELITY NEW MARKETS INCOME - INCOME FUND [MF]  | JT    | \$50,001 - \$100,000  | Dividends       | \$1,001 - \$2,500             | \$1,001 - \$2,500     |
| FIDELITY SALEM STR TR - EXTENDED MARKET INDEX FUND [MF]   | JT    | \$100,001 - \$250,000 | Dividends       | \$1,001 - \$2,500             | \$201 - \$1,000       |
| FIDELITY SALEM STR TR - INTERNATIONAL INDEX FUND [MF]   | JT    | \$100,001 - \$250,000 | Dividends       | \$2,501 - \$5,000             | \$2,501 - \$5,000     |
| Google Restricted Stock Units [PS]<br><br>DESCRIPTION: Spouse holds restricted stock units as part of employer's compensation plan. | SP    | \$15,001 - \$50,000   | Dividends       | None                          | None                  |
| ISHARES RUSSELL 2000 ETF [EF]   | JT    | \$1,001 - \$15,000    | Dividends       | \$1 - \$200                   | \$1 - \$200           |

| <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> |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Joint Ally Checkings Account [BA]                  | JT           | \$1,001 - \$15,000    | Interest              | \$1 - \$200                          | \$1 - \$200                  |
| Joint Ally Savings Account [BA]                    | JT           | \$1,001 - \$15,000    | Interest              | \$1 - \$200                          | \$1 - \$200                  |
| Josh Riley - Bank of America Checking Account [BA] |              | \$1,001 - \$15,000    | Interest              | \$1 - \$200                          | \$1 - \$200                  |
| Josh Riley 401K ⇒<br>FID 500 Index [MF]            |              | \$15,001 - \$50,000   | Dividends, Interest   | \$201 - \$1,000                      | \$201 - \$1,000              |
| Josh Riley 401K ⇒<br>FID Capital & Income [MF]     |              | \$1,001 - \$15,000    | Dividends, Interest   | \$201 - \$1,000                      | \$1 - \$200                  |
| Josh Riley 401K ⇒<br>FID Contrafund K [MF]         |              | \$1,001 - \$15,000    | Dividends, Interest   | \$201 - \$1,000                      | \$1 - \$200                  |
| Josh Riley 401K ⇒<br>FID Growth Co K [MF]          |              | \$50,001 - \$100,000  | Dividends, Interest   | \$5,001 - \$15,000                   | \$2,501 - \$5,000            |
| Josh Riley 401K ⇒<br>FID Intl Discovery K [MF]     |              | \$15,001 - \$50,000   | Dividends, Interest   | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| Josh Riley 401K ⇒<br>FID Intl Index [MF]           |              | \$15,001 - \$50,000   | Dividends, Interest   | \$201 - \$1,000                      | None                         |
| Josh Riley 401K ⇒<br>FID Mid Cap Stock K [MF]      |              | None                  | Dividends, Interest   | None                                 | \$1,001 - \$2,500            |
| Josh Riley 401K ⇒<br>FID Real Estate Invs [MF]     |              | \$1,001 - \$15,000    | Dividends, Interest   | \$1 - \$200                          | \$1 - \$200                  |
| Josh Riley 401K ⇒<br>FID Real Estate Invs [MF]     |              | \$1,001 - \$15,000    | Dividends, Interest   | \$1 - \$200                          | \$1 - \$200                  |
| Josh Riley 401K ⇒<br>FID US Bond Idx [MF]          |              | None                  | Dividends, Interest   | \$1 - \$200                          | \$201 - \$1,000              |
| Josh Riley 401K ⇒<br>FID Value K [MF]              |              | \$15,001 - \$50,000   | Dividends, Interest   | \$2,501 - \$5,000                    | \$1 - \$200                  |
| Josh Riley 401K ⇒<br>Invs Develop Mkt R6 [MF]      |              | \$15,001 - \$50,000   | Dividends, Interest   | \$1,001 - \$2,500                    | None                         |

| <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> |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Josh Riley 401K ⇒<br>JPM Core Bond R6 [MF]                                 |              | \$1,001 - \$15,000    | Dividends, Interest   | \$201 - \$1,000                      | \$201 - \$1,000              |
| Josh Riley 401K ⇒<br>MFS Value R6 [MF]                                     |              | \$50,001 - \$100,000  | Dividends, Interest   | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| Josh Riley 401K ⇒<br>PIM Total RT Inst [MF]                                |              | \$1,001 - \$15,000    | Dividends, Interest   | \$201 - \$1,000                      | \$1 - \$200                  |
| Josh Riley 401K ⇒<br>TRP Equity Income I [MF]                              |              | \$1,001 - \$15,000    | Dividends, Interest   | \$1,001 - \$2,500                    | None                         |
| Josh Riley 401K ⇒<br>Vang Inst TR 2045 [MF]                                |              | \$1,001 - \$15,000    | Dividends, Interest   | \$1 - \$200                          | None                         |
| JPMORGAN TRUST SMART - RETIREMENT 2035<br>FD CL A [MF]                     | JT           | \$50,001 - \$100,000  | Dividends             | \$2,501 - \$5,000                    | \$201 - \$1,000              |
| Monica Kohli - Google 401K ⇒<br>Target Retire 2045 Tr [MF]                 | SP           | \$100,001 - \$250,000 | Dividends, Interest   | None                                 | None                         |
| Monica Kohli - Wells Fargo Checkings Account [BA]                          | SP           | \$1,001 - \$15,000    | Interest              | \$1 - \$200                          | \$1 - \$200                  |
| Republic Restoratives LLC [PS]<br>DESCRIPTION: Non-publicly traded shares. |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| ROWE T PRICE EQUITY INCOME - FD CL I [MF]                                  | JT           | \$100,001 - \$250,000 | Dividends             | \$2,501 - \$5,000                    | \$2,501 - \$5,000            |
| SELECT SECTOR SPDR FUND [EF]   | JT           | \$50,001 - \$100,000  | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |
| THE INSURED DEPOSIT PROGRAM [BA]   | JT           | \$15,001 - \$50,000   | None                  |                                      |                              |
| VANGUARD ADMIRAL FDS INC [EF]  | JT           | \$250,001 - \$500,000 | Dividends             | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| VANGUARD INDEX FUNDS - VANGUARD<br>GROWTH ETF [EF]                         | JT           | \$250,001 - \$500,000 | Dividends             | \$1,001 - \$2,500                    | \$1,001 - \$2,500            |
| VANGUARD INDEX FUNDS - VANGUARD MID-<br>CAP GROWTH ETF [EF]                | JT           | \$100,001 - \$250,000 | Dividends             | \$201 - \$1,000                      | \$201 - \$1,000              |

| Asset  | Owner | Value of Asset        | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-----------------------|----------------|-------------------------------|-----------------------|
| VANGUARD LIFESTRATEGY FUND - GROWTH PORTFOLIO [MF] | JT    | \$100,001 - \$250,000 | Dividends      | \$2,501 - \$5,000             | \$1,001 - \$2,500     |

\* 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 |
|----------------------------|---------------|-------------------------------|-----------------------|
| Boies Schiller Flexner LLP | Salary        | \$14,074.00                   | \$746,503.00          |
| Jenner & Block             | Salary        | \$587,500.00                  | N/A                   |
| ProUnlimited               | Spouse Salary | \$83,693.00                   | \$139,343.00          |
| Google                     | Spouse Salary | \$60,425.00                   | N/A                   |

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

| Position                    | Name of Organization       |
|-----------------------------|----------------------------|
| Non-equity Partner (former) | Boies Schiller Flexner LLP |
| Non-equity Partner          | Jenner & Block             |

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- o Josh Riley 401K
- o Josh Riley 401K
- o Monica Kohli - Google 401K (Owner: SP)

## **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:** Josh Riley , 05/17/2022