



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Matt Cartwright  
**Status:** Member  
**State/District:** PA08

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 08/15/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
"Litigating Business and Commercial Tort Cases" published by Thomson Reuters [IP]		Undetermined	Royalties	\$1,001 - \$2,500	<input type="checkbox"/>
Archer Partners LLC ⇒ People's Security Checking Account [BA]		\$1 - \$1,000	None		<input type="checkbox"/>
Archer Partners LLC ⇒ Piper Archer III Single Prop aircraft [OL]  LOCATION: Scranton, PA, US DESCRIPTION: Asset of Archer Partners LLC		\$100,001 - \$250,000	None		<input type="checkbox"/>
B.O.B. Digital Marketing Agency, LLC [OL]  LOCATION: Scranton, PA, US DESCRIPTION: New asset acquired in 2021, and filer is voluntarily reporting it. The value is below \$1000 and there were no reportable transactions.	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Blackrock Mid Cap Growth A [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Columbia Acorn International Fund [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Elfun Trusts Funds [MF]		\$250,001 -	Capital Gains,	\$15,001 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$500,000	Interest	\$50,000	<input type="checkbox"/>
Hague NY Property Trust [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Hague, NY, US					
Merrill Edge Cash/Money Account [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Met Life Whole Life Policy [WU]		\$15,001 - \$50,000	Dividends, Interest	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB Flexfee Large Cap [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB Select US Long/Short [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ American WA Mutual [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Aquila Three Peaks Opportunity Growth [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Baron Growth Institutional [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Blackrock Income Institutional [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Blackrock Midcap Growth [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Brandywine Global High Yield [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Calvert Small Cap [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Cohen & Steers Low Duration [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Dividend Income [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Morgan Stanley Investment Account ⇒ Columbia Floating Rate [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Small Cap Growth [MF]	SP	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Strategic Muni Inc [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Credit Suisse Strategic Income [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Eaton Vance Advantage Floating Rate [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Fidelity Advantage Growth Opportunities [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Franklin Dynatech Advisor [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Goldman Sachs Dynamic Muni [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Goldman Sachs High Yield Muni [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Guggenheim Macro Opportunities [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Invesco Conservative Inc Institutional [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Janus Henderson Balanced [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ JP Morgan Global Bond Opportunity [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ JP Morgan Hedged Equity [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Lazard Global Listed [MF]	SP	None	Dividends	None	<input checked="" type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Morgan Stanley Investment Account ⇒ Legg Mason Clearbridge [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Loomis Sayles Global Allocation [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Lord Abbett Bond Debenture [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Lord Abbett Short Duration [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Massmutual Global Credit [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Morgan Stanley Bank Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Morgan Stanley Global Fixed Income [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Morgan Stanley Mortgage Securities Trust [MF]	SP	None	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ MSIF Ultra-Short Income [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Natixis US Opportunity [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Nuance MidCap Value Institutional [MF]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Pacific Floating Rate [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Performance Trust Strategic Bond [MF]	SP	None	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ PGIM Absolute Return Bond [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
PGIM Short Duration High Yield [MF]					
Morgan Stanley Investment Account ⇒ Pimco International Bond USD Hedged [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Pioneer Multi Asset Ultra-Short [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Principal Blue Chip [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Principal MidCap [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Putnam Diversified [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Putnam Ultra Short Duration [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Semper MBS Total Return [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ T Rowe Price All Cap Opportunity Fund [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ T Rowe Price Global Stock Fund [MF]	SP	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Victory Floating Rate [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Victory Incore Investment Grade [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Virtus KAR International Small Cap [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Virtus KAR Small Cap [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Voya Strategic Income Opportunity [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley Investment Account ⇒ WCM Focused International Growth [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ WCM International Small Cap Growth [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Wisdomtree Trust US Quality [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Wisdomtree US Midcap [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Munley Financing [OL]  LOCATION: Scranton, PA, US DESCRIPTION: Ownership interest	SP	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Munley Law PC [OL]  LOCATION: Scranton, PA, US DESCRIPTION: Ownership interest		\$50,001 - \$100,000	None		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corp Bond [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corp Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Treasury Bond [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Treasury Bond [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 3-7 Year Treasury Bond [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒	SP	\$50,001 -	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IShares 3-7 Year Treasury Bond [EF]		\$100,000			<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares 7-10 Year Treasury Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares Broad USD Invt Grade [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares Broad USD Invt Grade [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI EAFE [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI EAFE [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI Emerging Markets [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI Emerging Markets [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares IBOXX Invt Grade Corp Bond [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares IBOXX Invt Grade Corp Bond [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares JPM USD Emerging Markets Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares JPM USD Emerging Markets Bond [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Growth [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Growth [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Value [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell MidCap [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell MidCap [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Liquid Assets Govt Fund [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Liquid Assets Govt Fund [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corp Bond [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corp Bond [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ US Treasury Inflation Protected Note 7/15/2022 [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ US Treasury Note 2/15/2023 [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>



Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Nantucket Holding Company [RP]  LOCATION: Scranton, PA, US DESCRIPTION: Holding company for 231 and 241 Penn Ave	JT	\$50,001 - \$100,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Penn Avenue Properties [RP]  LOCATION: Scranton, PA, US	SP	\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
People's Security Bank Accounts [BA]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
PNC Bank Accounts [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
TD Ameritrade Account ⇒ Bristol-Myers Squibb Company (BMY) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TD Ameritrade Account ⇒ General Electric Company (GE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TD Ameritrade Account ⇒ TD Ameritrade Sweep Account [BA]	JT	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
TD Ameritrade Account ⇒ Westinghouse Air Brake Technologies Corporation (WAB) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
UBS Investment Account ⇒ Ishares Core MSCI EAFE [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
UBS Investment Account ⇒ Pimco Enhanced Short Maturation [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
UBS Investment Account ⇒ Vanguard Short Term Corporate Bond [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
UBS Investment Account ⇒ Vanguard Total Stock Market [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Investment Account ⇒	JT	\$100,001 -	Interest	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cash Reserve Federal Money Market Fund [MF]		\$250,000			<input type="checkbox"/>
Vanguard Investment Account ⇒ Emerging Markets Stock Index [MF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard Investment Account ⇒ Real Estate Index (REIT) [MF]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Treasury Money Market [MF]	JT	\$250,001 - \$500,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Investment Account ⇒ Vanguard Growth Index Fund [MF]	JT	None	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard Investment Account ⇒ Wellesley Income Fund [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Wayne Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

\* 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?
Blackrock Midcap Growth [MF]		02/15/2021	P	\$1,001 - \$15,000	
Columbia Acorn International Fund [MF]		06/10/2021	P	\$1,001 - \$15,000	
Columbia Acorn International Fund [MF]		12/20/2021	P	\$15,001 - \$50,000	
Elfin Trust Funds [MF]		12/27/2021	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ AB Flexfee Large Cap [MF]	SP	07/28/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB Large Cap [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley Investment Account ⇒ AB Large Cap Growth [MF]	SP	10/12/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ AB Select US Long-Short [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ American WA Mutual [MF]	SP	04/8/2021	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ American WA Mutual [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Baron Growth Institutional [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Baron Growth Institutional [MF]	SP	10/12/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Baron Growth Institutional [MF]	SP	07/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Blackrock Income Institutional [MF]	SP	01/19/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Blackrock Income Institutional [MF]	SP	03/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Blackrock Income Institutional [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Blackrock Income Institutional [MF]	SP	07/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Blackrock Midcap Growth [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Blackrock Midcap Growth [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Brandywine Global High Yield [MF]	SP	10/12/2021	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Morgan Stanley Investment Account ⇒ Calvert Small Cap [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Cohen & Steers Low Duration [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Cohen & Steers Low Duration [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Cohen & Steers Low Duration [MF]	SP	10/12/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Columbia Dividend Income [MF]	SP	01/19/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Columbia Dividend Income [MF]	SP	02/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Columbia Dividend Income [MF]	SP	03/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Columbia Dividend Income [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Columbia Dividend Income [MF]	SP	07/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Floating Rate [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Small Cap Growth [MF]	SP	10/12/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Columbia Strategic Income [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Columbia Strategic Income [MF]	SP	07/28/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Columbia Strategic Income [MF]	SP	10/12/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒	SP	02/16/2021	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Credit Suisse Strategic Income [MF]					
Morgan Stanley Investment Account ⇒ Credit Suisse Strategic Income [MF]	SP	03/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Credit Suisse Strategic Income [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Credit Suisse Strategic Income [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Eaton Vance Advantage Floating Rate [MF]	SP	01/19/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Eaton Vance Advantage Floating Rate [MF]	SP	02/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Eaton Vance Advantage Floating Rate [MF]	SP	03/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Eaton Vance Advantage Floating Rate [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Eaton Vance Advantage Floating Rate [MF]	SP	10/12/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Fidelity Advantage Growth Opportunity [MF]	SP	01/19/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Fidelity Advantage Growth Opportunity [MF]	SP	03/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Fidelity Advantage Growth Opportunity [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Fidelity Advantage Growth Opportunity [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Fidelity Advantage Growth Opportunity [MF]	SP	07/28/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Franklin Dynatech Advisor [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley Investment Account ⇒ Franklin Dynatech Advisor [MF]	SP	07/28/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Goldman Sachs Dynamic Muni [MF]	SP	01/19/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Goldman Sachs Dynamic Muni [MF]	SP	03/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Goldman Sachs Dynamic Muni [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Goldman Sachs Dynamic Muni [MF]	SP	10/12/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Goldman Sachs High Yield Muni [MF]	SP	10/12/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Guggenheim Macro Opportunities [MF]	SP	10/12/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Invesco Conservative Income Institutional [MF]	SP	05/12/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Invesco Conservative Income Institutional [MF]	SP	04/8/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Janus Henderson Balanced [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ JP Morgan Global Bond Opportunity [MF]	SP	07/28/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ JP Morgan Hedged Equity [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Lazard Global Listed [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Legg Mason Clearbridge [MF]	SP	01/19/2021	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Morgan Stanley Investment Account ⇒ Legg Mason Clearbridge [MF]	SP	02/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Legg Mason Clearbridge [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Legg Mason Clearbridge [MF]	SP	05/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Legg Mason Clearbridge [MF]	SP	07/28/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Loomis Sayles Global Allocation [MF]	SP	04/12/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Lord Abbett Bond Debenture [MF]	SP	04/12/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Lord Abbett Short Duration [MF]	SP	01/19/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Lord Abbett Short Duration [MF]	SP	02/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Lord Abbett Short Duration [MF]	SP	03/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Lord Abbett Short Duration [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Massmutual Global Credit [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Massmutual Global Credit [MF]	SP	07/28/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Morgan Stanley Global Fixed Income [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Morgan Stanley Mortgage Securities Trust [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
MSIF Ultra-Short Income [MF]					
Morgan Stanley Investment Account ⇒ MSIF Ultra-Short Income [MF]	SP	04/8/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Natixis US Opportunity [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Nuance Mid Cap Value [MF]	SP	01/19/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Nuance Mid Cap Value [MF]	SP	02/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Nuance Mid Cap Value [MF]	SP	03/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Nuance Mid Cap Value [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Nuance Mid Cap Value [MF]	SP	12/22/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Nuance Mid Cap Value [MF]	SP	07/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Pacific Floating Rate [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Performance Trust Strategic Fund [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ PGIM Absolute Return Bond [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ PGIM Short Duration High Yield [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Pimco International Bond [MF]	SP	10/12/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Pioneer Multi-Asset Ultra-Short [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley Investment Account ⇒ Principal Blue Chip [MF]	SP	01/19/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Principal Blue Chip [MF]	SP	02/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Principal Blue Chip [MF]	SP	03/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Principal Blue Chip [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Principal Blue Chip [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Principal Blue Chip [MF]	SP	07/28/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Principal MidCap [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Putnam Diversified [MF]	SP	04/12/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Putnam Ultra Short Duration [MF]	SP	04/12/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Semper MBS Total Return [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ T Rowe Price All Cap Opportunity Fund [MF]	SP	07/28/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ T Rowe Price Global Stock Fund [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ T Rowe Price Global Stock Fund [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Victory Floating Rate [MF]	SP	07/28/2021	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley Investment Account ⇒ Victory Incore Investment Grade [MF]	SP	04/8/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Virtus KAR International [MF]	SP	10/12/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Virtus KAR Small Cap [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Virtus KAR Small Cap [MF]	SP	05/10/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Voya Strategic Income Opportunity [MF]	SP	01/19/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Voya Strategic Income Opportunity [MF]	SP	03/16/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Voya Strategic Income Opportunity [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Voya Strategic Income Opportunity [MF]	SP	07/28/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ WCM Focused International Growth [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ WCM International Small Cap Growth [MF]	SP	10/12/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Wisdomtree Trust US Quality [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Wisdomtree Trust US Quality [MF]	SP	07/28/2021	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Wisdomtree US Midcap [MF]	SP	04/8/2021	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iSHARES 0-5 HY CORP BOND [EF]	SP	05/20/2021	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒		10/15/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iSHARES 0-5 HY CORP BOND [EF]					
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Year Treasury Bond [EF]	SP	10/15/2021	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Year Treasury Bond [EF]		11/24/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Year Treasury Bond [EF]		02/10/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 3-7 Year Treas Bond [EF]		02/10/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 7-10 Year Treasury Bond [EF]		02/10/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Broad USD Invt Grade Corporate Bond [EF]	SP	05/20/2021	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ iShares Broad USD Invt Grade Corporate Bond [EF]		03/2/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Broad USD Invt Grade Corporate Bond [EF]		05/20/2021	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Core MSCI EAFE [EF]		05/20/2021	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iSHARES CORE MSCI EAFE [EF]	SP	05/20/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iSHARES CORE MSCI EAFE [EF]		03/2/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares IBOXX \$ Invest Gr Cor BD [EF]	SP	10/15/2021	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ iShares IBOXX \$ Invest Gr Cor BD [EF]	SP	05/20/2021	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ iShares IBOXX \$ Invest Gr Cor BD [EF]		03/2/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Munley Law Profit Sharing Plan ⇒ iShares IBOXX \$ Invest Gr Cor BD [EF]		10/15/2021	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares IBOXX \$ Invest Gr Cor BD [EF]		05/20/2021	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth [EF]	SP	05/20/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth [EF]		03/2/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth [EF]		02/10/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth [EF]		05/20/2021	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth [EF]		11/24/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value [EF]	SP	05/20/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value [EF]		03/2/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value [EF]		02/10/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value [EF]		05/20/2021	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 [EF]	SP	05/20/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 [EF]		02/10/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 [EF]		05/20/2021	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Munley Law Profit Sharing Plan ⇒ iShares Russell Midcap [EF]	SP	05/20/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell Midcap [EF]		03/2/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell Midcap [EF]		02/10/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell Midcap [EF]		05/20/2021	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corporate Bond [EF]	SP	05/20/2021	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corporate Bond [EF]		03/2/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corporate Bond [EF]		05/20/2021	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corporate Bond ETF [EF]	SP	10/15/2021	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]	SP	05/20/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]		03/2/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]		02/10/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]		05/20/2021	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]		03/2/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
UBS Investment Account ⇒ Ishares Core MSCI EAFE [MF]	JT	04/20/2021	P	\$15,001 - \$50,000	
UBS Investment Account ⇒	JT	04/20/2021	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Pimco Enhanced Short Maturation [MF]					
UBS Investment Account ⇒ Vanguard Short Term Corporate Bond [MF]	JT	04/20/2021	P	\$15,001 - \$50,000	
UBS Investment Account ⇒ Vanguard Total Stock Market [MF]	JT	04/20/2021	P	\$15,001 - \$50,000	
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	03/25/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	06/28/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	07/7/2021	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	09/28/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	12/20/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Cash Reserve Federal Money Market [MF]	JT	01/19/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Cash Reserve Federal Money Market [MF]	JT	07/7/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Emerging Markets Stock Index [MF]	JT	06/18/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Emerging Markets Stock Index [MF]	JT	09/17/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Emerging Markets Stock Index [MF]	JT	12/19/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Treasury Money Market [MF]	JT	07/7/2021	P	\$250,001 - \$500,000	
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	03/24/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	06/23/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	09/23/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	12/23/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [MF]	JT	03/24/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [MF]	JT	09/17/2021	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [MF]	JT	12/20/2021	P	\$1,001 - \$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
Munley Law	Spouse Salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	People's Security Bank	2021 periodic	Law firm line of credit	\$1,000,001 - \$5,000,000
JT	People's Security Bank	March 2008	Mortgage on office property	\$250,001 - \$500,000
JT	People's Security Bank	1998	Mortgage on personal residence	\$15,001 - \$50,000
JT	People's Security Bank	September 2020	Home Equity loan	\$50,001 - \$100,000
JT	American Express	December 2021	Revolving credit card	\$15,001 - \$50,000
SP	Bank of America	December 2021	Revolving credit card	\$15,001 - \$50,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee (uncompensated)	Hague Personal Residence Trust
Officer (uncompensated)	Archer Partners LLC

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2012	Munley Law Firm and filer	Continued participation in profit sharing plan (no new contributions, investment income reinvestment only)

## 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 Archer Partners LLC  
LOCATION: US
- o Morgan Stanley Investment Account (Owner: SP)  
LOCATION: US
- o Munley Law Profit Sharing Plan
- o Munley Law Profit Sharing Plan (Owner: SP)
- o TD Ameritrade Account (Owner: JT)  
LOCATION: US
- o UBS Investment Account (Owner: JT)  
LOCATION: US
- o Vanguard Investment Account (Owner: JT)  
LOCATION: US

## 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. Matt Cartwright , 08/15/2022