



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Sarah Morgenthau
Status: Congressional Candidate
State/District: RI02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 08/12/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ADP 401k ⇒ AmFunds Washington Mutual [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
ADP 401k ⇒ Blackrock Global Equity ex US [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
ADP 401k ⇒ Blackrock Russell 3000 Idx [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
ADP 401k ⇒ Blackrock US Debt Idx [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
ADP 401k ⇒ Victory RS Small Cap Growth [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
ADP 401k ⇒ Voya Tgt Solution 2030 [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Calvert US Large Value (CFJIX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	None	\$2,501 - \$5,000
Campaign Loan [DO]		\$100,001 - \$250,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chase Checking Account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Child 1 529 College Savings Account ⇒ Vanguard 500 Idx (VFIAX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Child 1 529 College Savings Account ⇒ Vanguard High Yield Bond [MF]	JT	\$1,001 - \$15,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Child 2 529 Savings Account ⇒ Vanguard MMF [MF]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Child 2 College Savings Account ⇒ DC College Savings Portfolio [MF]	JT	\$15,001 - \$50,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Child 2 College Savings Account ⇒ Vanguard 500 Idx (VFIAX) [MF]	JT	\$50,001 - \$100,000	Dividends, Interest	\$201 - \$1,000	\$1 - \$200
Child 2 College Savings Account ⇒ Vanguard High Yield Bond [MF]	JT	\$50,001 - \$100,000	Dividends, Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
DFA Emerg Mkts Sus Core (DESIX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
DFA Int'l Sus Core [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$201 - \$1,000	\$15,001 - \$50,000
DFA US Core (DEFOX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
DFA US Sus Core (DFSIX) [MF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
DFA US Tgt Value (DFVFX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
DLA Piper 401k ⇒ Vanguard Inst Idx (VINIX) [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Fidelity 401k ⇒ iShares S&P 500 Index [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Fidelity 401k ⇒	SP	\$50,001 -	Interest	\$1,001 - \$2,500	\$2,501 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Stable Value Fund [MF]		\$100,000			\$5,000
Fidelity Gov't MMF [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
GST Accounts ⇒ Calvert US Large Value (CFJIX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
GST Accounts ⇒ DFA Emerg Mkts Sus Core (DESIX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
GST Accounts ⇒ DFA Int'l Sus Core (DFSPX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
GST Accounts ⇒ DFA US Core (DEFOX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
GST Accounts ⇒ DFA US Sus Core (DFSIX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
GST Accounts ⇒ DFA US Sus Tgt Val (DAABX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
GST Accounts ⇒ DFA US Tgt Value (DFVFX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
GST Accounts ⇒ JPMorgan ST Core Plus (JSDSX) [MF]		\$100,001 - \$250,000	Dividends, Interest	\$1,001 - \$2,500	\$2,501 - \$5,000
GST Accounts ⇒ Matthews Asia Innov (MITEX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
GST Accounts ⇒ Pax Global Env (PGINX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
GST Accounts ⇒ Schwab MMF [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
GST Accounts ⇒ Vanguard Div Grth (VDIGX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
GST Accounts ⇒ Vanguard Info Tech (VITAX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
GST Accounts ⇒ Vanguard Ltd-Term Tax-Ex (VMLUX) [MF]		\$100,001 - \$250,000	Dividends, Interest	\$1,001 - \$2,500	\$2,501 - \$5,000
GST Accounts ⇒ Vanguard ST Inv Grade (VFSUX) [MF]		\$100,001 - \$250,000	Dividends, Interest	\$1,001 - \$2,500	\$2,501 - \$5,000
JPM Short Core Plus (JSDSX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Matthews Asia Innov (MITEX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
Merck & Company, Inc. Common Stock (MRK) [ST]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Organon & Co. Common Stock When Issued (OGN.V) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Partnership Capital Account--DLA Piper LLP [OL] LOCATION: Washington, DC, US DESCRIPTION: Partnership Capital Account	SP	Spouse/DC Over \$1,000,000	None		
Partnership Income--DLA Piper LLP [OT] DESCRIPTION: Partnership Income DLA Piper LLP	SP	Spouse/DC Over \$1,000,000	None		
Pax Global Env (PGINX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Pfizer, Inc. (PFE) [ST]	SP	\$250,001 - \$500,000	Dividends, Interest	\$2,501 - \$5,000	\$5,001 - \$15,000
Spouse Pension [PE]	SP	\$100,001 - \$250,000	None		
Vanguard 500 Idx (VFIAX) [MF]	JT	\$250,001 - \$500,000	Dividends, Interest	\$201 - \$1,000	\$1,001 - \$2,500
Vanguard Cash MMF (VMRXX) [BA]	JT	\$500,001 - \$1,000,000	Interest	\$2,501 - \$5,000	\$5,001 - \$15,000
Vanguard Div Grth (VDIGX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Emerging Mkts (VEMAX) [MF]	JT	\$1 - \$1,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
Vanguard Equity Income (VEIRX) [MF]	JT	\$15,001 - \$50,000	Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
Vanguard Info Tech (VITAX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Vanguard Interm Treas (VFIUX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Vanguard IRA ⇒ Vanguard Int'l Growth (VWIGX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Vanguard Ltd-Term Tax-Ex (VMLUX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	None	\$2,501 - \$5,000
Vanguard Rollover ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Vanguard Rollover ⇒ Vanguard 2030 Inv (VTHR) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Vanguard Rollover ⇒ Vanguard 500 Idx (VFIAX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Vanguard Rollover ⇒ Vanguard MMF [MF]		\$50,001 - \$100,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
Vanguard Roth IRA ⇒ Amgen Inc. (AMGN) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Vanguard Roth IRA ⇒ Cigna Corporation (CI) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Roth IRA ⇒ Comcast Holdings ZONES (CCZ) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Vanguard Roth IRA ⇒ Johnson & Johnson (JNJ) [ST]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Vanguard Roth IRA ⇒ Juniper Networks, Inc. (JNPR) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Roth IRA ⇒ Lumentum Holdings Inc. (LITE) [ST]	SP	\$1 - \$1,000	None		
Vanguard Roth IRA ⇒ Target Corporation (TGT) [ST]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Vanguard Roth IRA ⇒ The Travelers Companies, Inc. (TRV) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Roth IRA ⇒ Vanguard Equity Income (VEIRX) [MF]	SP	\$50,001 - \$100,000	Dividends, Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
Vanguard Roth IRA ⇒ Vanguard Federal MMF [BA]	SP	\$100,001 - \$250,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
Vanguard Roth IRA ⇒ Vanguard Wellington (VWENX) [MF]	SP	Spouse/DC Over \$1,000,000	Dividends, Interest	\$15,001 - \$50,000	\$5,001 - \$15,000
Vanguard Roth IRA ⇒ Viavi Solutions Inc. (VIAV) [ST]	SP	\$1 - \$1,000	Dividends	None	None
Vanguard Roth IRA ⇒ Westinghouse Air Brake Technologies Corporation (WAB) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard ST Bond Idx (VBIRX) [MF]	JT	\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
Vanguard ST Inv Grade (VFSUX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Vanguard Wellington (VWENX) [MF]	JT	\$1,000,001 - \$5,000,000	Dividends, Interest	\$50,001 - \$100,000	\$50,001 - \$100,000
Viatrix Inc. (VTRS) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wellesley Income Fund (VWIAX) [MF]	JT	\$15,001 - \$50,000	Dividends, Interest	\$201 - \$1,000	\$1,001 - \$2,500
Wells Fargo Savings Account [BA]	SP	\$50,001 - \$100,000	Interest	\$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
Nardello	Salary	N/A	\$291,000.00
US Government	Salary	\$28,000.00	\$45,471.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Wells Fargo Bank	April 2021	Capital Loan	Spouse/DC Over \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Managing Director	Nardello
Deputy Asst. Secretary	US Dept. of Commerce

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 ADP 401k
- o Child 1 529 College Savings Account
LOCATION: US
- o Child 2 529 Savings Account
LOCATION: US
- o Child 2 College Savings Account
LOCATION: US
DESCRIPTION: Education Savings Account
- o Child 2 College Savings Account
LOCATION: US
DESCRIPTION: 529 College Savings Account

- DLA Piper 401k (Owner: SP)
- Fidelity 401k (Owner: SP)
- GST Accounts
- Vanguard IRA (Owner: SP)
- Vanguard Rollover (Owner: SP)
- Vanguard Roth IRA (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: Sarah Morgenthau , 08/12/2022