



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Jeremy Shaffer
Status: Congressional Candidate
State/District: PA17

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 04/17/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 Fund ⇒ Victory Capital 529 - Growth [EF]		\$50,001 - \$100,000	Tax-Deferred		
529 Fund ⇒ Victory Capital 529 - Moderate [EF]		\$1,001 - \$15,000	Tax-Deferred		
AMEX Savings [BA]		\$250,001 - \$500,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
ATI Investments LP [OL] LOCATION: Mercer, PA, US DESCRIPTION: Passive investment for BlueTree Allied Angels in ALung Technologies		\$15,001 - \$50,000	None		
Bitcoin - Paypal [OT] DESCRIPTION: bitcoin held in paypal account		\$1,001 - \$15,000	None		
Brokerage - BSY plan ⇒ Bentley Stock Options (Vested) [OP] DESCRIPTION: Call Options for 2,500 shares of Bentley Stock Class B at strike price of \$5.74. Vested March 22, 2022		\$50,001 - \$100,000	None		
Brokerage - BSY plan ⇒ Bentley Systems, Incorporated - Class B (BSY) [ST]		\$100,001 - \$250,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Stock from Restricted Stock Grants, Options Exercise and Employee Stock Purchase Plan					
Brokerage - Etrade ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Brokerage - Etrade ⇒ Autodesk, Inc. (ADSK) [ST]		\$100,001 - \$250,000	None		
Brokerage - Etrade ⇒ Bank of America Corporation (BAC) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Brokerage - Etrade ⇒ Bentley Systems, Incorporated - Class B (BSY) [ST]		\$1,000,001 - \$5,000,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Brokerage - Etrade ⇒ Cash Sweep Vehicle [BA]		\$1,000,001 - \$5,000,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Brokerage - Etrade ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage - Etrade ⇒ Lowe's Companies, Inc. (LOW) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage - Etrade ⇒ Schwab International Equity ETF (SCHF) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Brokerage - Etrade ⇒ SPDR Gold Trust (GLD) [ST]		\$15,001 - \$50,000	None		
Brokerage - Etrade ⇒ VanEck Gold Miners ETF (GDX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage - Etrade ⇒ VanEck Semiconductor ETF (SMH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage - Etrade ⇒ Vanguard Small-Cap Growth ETF (VBK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage - Etrade ⇒ Vanguard Small-Cap Value ETF (VBR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brokerage - Fidelity ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Brokerage - Fidelity ⇒ iShares Silver Trust (SLV) [ST]		\$1,001 - \$15,000	None		
Brokerage - Fidelity ⇒ SPAXX Fidelity Government Money Market [EF]		\$500,001 - \$1,000,000	Interest	\$1 - \$200	\$1 - \$200
Brokerage - Fidelity ⇒ SPDR Gold Trust (GLD) [ST]		\$15,001 - \$50,000	None		
Brokerage - old Etrade ⇒ Cash Sweep Vehicle [OT]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: non-invested Cash in stock account					
BT 360 Investments LP [OL]		\$1,001 - \$15,000	None		
LOCATION: Mercer, PA, US					
DESCRIPTION: Passive investment vehicle for BlueTree Allied Investors in C360 Technologies					
BT Aurochs Investments LP [OL]		None	None		
LOCATION: Mercer, PA, US					
DESCRIPTION: Passive investment via BlueTree Allied Angels in PittMoss. Note: investment shows as having negative value on current K-1. Original investment was in \$15,001-\$50,000 range.					
BT Peptilogics Investments LP [OL]		\$15,001 - \$50,000	None		
LOCATION: Mercer, PA, US					
DESCRIPTION: Passive investment vehicle for BlueTree Allied Angels in Peptilogics					
BT Pittmoss Investments [OL]		None	None		
LOCATION: Mercer, PA, US					
DESCRIPTION: Passive investment in Aurochs Brewing Company via BlueTree Allied Investors. Note: Current value is showing as negative on K-1. Original investment was in \$1,001 to \$15,000 range.					
Empower 401K ⇒ American Century Real Estate R6 [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Empower 401K ⇒ American Funds EuroPacific Gr R6 [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Empower 401K ⇒ Bentley Systems, Incorporated - Class B (BSY) [ST]		\$50,001 - \$100,000	Dividends	\$1 - \$200	\$1 - \$200
Empower 401K ⇒ JPMorgan Smart Blend 2040-R5 [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Empower 401K ⇒ Vanguard Institutional Index Fund [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Empower 401K ⇒ Vanguard Mid Cap Index 1 [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Empower 401K ⇒ Vanguard Small Cap Index 1 [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Empower 401K ⇒ Vanguard Total Intl Stock Index Instl [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Ethereum - Paypal [OT] DESCRIPTION: Ethereum held in paypal account		\$1,001 - \$15,000	None		
Firstrade IRA ⇒ Cash in IRA [IH]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Firstrade IRA ⇒ LAIAX - Columbia Acorn International A [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Firstrade IRA ⇒ VEXAX - Vanguard Extended Market Index [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Interactive Brokers Cash [OT] DESCRIPTION: Cash held in IB account - no interest		\$15,001 - \$50,000	None		
IRA that was old 401k at previous job (etrade) ⇒ Autodesk, Inc. (ADSK) [ST]		\$15,001 - \$50,000	None		
IRA that was old 401k at previous job (etrade) ⇒ Cambria Shareholder Yield ETF (SYLD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA that was old 401k at previous job (etrade) ⇒ Cash Sweep Vehicle [OT] DESCRIPTION: non-invested cash in stock account		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
IRA that was old 401k at previous job (etrade) ⇒ iShares Silver Trust (SLV) [ST]		\$15,001 - \$50,000	None		
Janus [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
MA Fund 1, a series of 99 Tartans [OL]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Seattle, WA, US					
DESCRIPTION: passive ownership in fund for Mach 9 company investment					
Navy Federal Credit Union [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
PNC Account [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
PNC Account [BA]	DC	\$1 - \$1,000	Interest	\$1 - \$200	None
PNC Checking [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
PNC Savings [BA]		\$250,001 - \$500,000	Interest	\$1 - \$200	\$201 - \$1,000
Schwab IRA [IH]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
TDAmeritrade Acct ⇒ Cash Sweep Vehicle [BA]		\$500,001 - \$1,000,000	Interest	\$1 - \$200	\$1 - \$200
TDAmeritrade Acct ⇒ Home Depot, Inc. (HD) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$201 - \$1,000
TDAmeritrade Acct ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [ST]		\$1,001 - \$15,000	None		
TDAmeritrade Roth IRA ⇒ Bank of America Corporation (BAC) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
TDAmeritrade Roth IRA ⇒ Cash [IH]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
TDAmeritrade Roth IRA ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TDAmeritrade SEP IRA ⇒ Autodesk, Inc. (ADSK) [ST]		\$15,001 - \$50,000	None		
TDAmeritrade SEP IRA ⇒ Cash [IH]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
TDAmeritrade SEP IRA ⇒ Federated Hermes, Inc. (FHI) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Thread International [PS]		\$15,001 - \$50,000	None		
DESCRIPTION: Start-up company originally in Pittsburgh that makes backpacks and fabric out of recycled trash.					
UPMC Retirement Savings Plan ⇒ JPMorgan Large Cap Growth [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UPMC Retirement Savings Plan ⇒ Vanguard Institutional Index Fund [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UPMC Retirement Savings Plan ⇒ Vanguard Total Intl Stock Index [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UPMC Retirement Savings Plan ⇒ Vanguard Wellington Fund [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UPMC Retirement Savings Plan ⇒ Victory Sycamore Small Company Opp 1 [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
USAA Checking [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
USAA Emerging Markets Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Savings [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Victory Capital IRA ⇒ USAA 500 Index Fund Member [EF]		\$15,001 - \$50,000	Tax-Deferred		
Victory Capital IRA ⇒ USAA Aggressive Growth Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA ⇒ USAA Extended Market Index Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA ⇒ USAA High Income Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA ⇒ USAA International Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA ⇒ USAA Money Market Fund [EF]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Victory Capital IRA ⇒ USAA Sustainable World Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA ⇒ USAA Treasury Money Market Trust [EF]		\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA ⇒ USAA Value Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA (wife) ⇒ USAA Aggressive Growth Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA (wife) ⇒ USAA Emerging Markets Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA (wife) ⇒ USAA High Income Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA (wife) ⇒ USAA International Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA (wife) ⇒ USAA Money Market Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA (wife) ⇒ USAA NASDAQ 100 Index Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Victory Capital IRA (wife) ⇒ USAA Value Fund [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
WESTERN WEALTH CAPITAL LXX US INV [OL]		None	None		
LOCATION: Peonix, AZ, US					
DESCRIPTION: Passive Ownership in Cantala (Note: K1 shows asset has a negative value so assigned value of none)					

* 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
Bentley Systems	Salary	\$71,971.85	\$296,928.13

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Northern Tier Regional Library
Director	Northland Library Foundation
Commissioner	Ross Township

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2022	Bentley Systems 401K Empower Retirement Plan	Continued maintenance of account per standard practice when an employee leaves the company

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

Source (Name and Address)	Brief Description of Duties
Bentley Systems (Exton, PA, US)	Employee of Company

COMMENTS: Value of Exercised Stock Options in 2021 (\$210,734.91)

SCHEDULE A ASSET CLASS DETAILS

o 529 Fund LOCATION: PA
o Brokerage - BSY plan LOCATION: US
o Brokerage - Etrade LOCATION: US
o Brokerage - Fidelity LOCATION: US
o Brokerage - old Etrade LOCATION: US
o Empower 401K
o Firstrade IRA (Owner: SP)
o IRA that was old 401k at previous job (etrade)
o TD Ameritrade Acct LOCATION: US

- TD Ameritrade Roth IRA
- TD Ameritrade SEP IRA
- UPMC Retirement Savings Plan (Owner: SP)
- Victory Capital IRA
LOCATION: US
- Victory Capital IRA (wife) (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: Jeremy Shaffer , 04/17/2022