



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Alessandra Biaggi  
**Status:** Congressional Candidate  
**State/District:** NY17

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2022  
**Filing Date:** 06/16/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset   | Owner | Value of Asset       | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|----------------------|----------------|-------------------------------|-----------------------|
| Alliant Federal Credit Union Accounts [BA]                                  | JT    | \$50,001 - \$100,000 | Interest       | \$1 - \$200                   | \$1 - \$200           |
| Bitcoin [OT]  | SP    | \$50,001 - \$100,000 | None           |                               |                       |
| DESCRIPTION: BTC held on Coinbase and in private hardware wallet.           |       |                      |                |                               |                       |
| Chase Checking Account [BA]   |       | \$1,001 - \$15,000   | Interest       | \$1 - \$200                   | \$1 - \$200           |
| Fidelity Brokerage Account ⇒<br>Fidelity 500 Index Fund [MF]                | SP    | \$1,001 - \$15,000   | None           |                               |                       |
| Fidelity Brokerage Account ⇒<br>Fidelity Select Software & IT Services [MF] | SP    | \$1,001 - \$15,000   | None           |                               |                       |
| Fidelity Rollover IRA ⇒<br>Fidelity Climate Action Fund [MF]                | SP    | \$1,001 - \$15,000   | None           |                               |                       |
| Fidelity Roth IRA ⇒<br>ARK ETF Genomic Revolution ETF [EF]                  | SP    | \$1,001 - \$15,000   | None           |                               |                       |
| Fidelity Roth IRA ⇒   | SP    | \$1,001 - \$15,000   | 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> |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| ARK ETF TR Autonomous Technology [EF]                                      |              |                       |                       |                                      |                              |
| Fidelity Roth IRA ⇒<br>Fidelity NASDAQ Composite Index [MF]                | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fidelity Roth IRA ⇒<br>Fidelity Select Biotechnology [MF]                  | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fidelity Roth IRA ⇒<br>Fidelity Select Software & IT Services [MF]         | SP           | \$1,001 - \$15,000    | Capital Gains         | \$1 - \$200                          | \$1 - \$200                  |
| Fidelity Roth IRA ⇒<br>Listed Fund Trust Roundhill Ball Metaverse ETF [EF] | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| Fidelity Roth IRA ⇒<br>Microsoft Corporation (MSFT) [ST]                   | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| Guideline 401K ⇒<br>Vanguard Developed Markets Index [MF]                  | SP           | \$1,001 - \$15,000    | Capital Gains         | \$1 - \$200                          | \$1 - \$200                  |
| Guideline 401K ⇒<br>Vanguard Emerging Markets Stock Index [MF]             | SP           | \$1,001 - \$15,000    | Capital Gains         | \$1 - \$200                          | \$1 - \$200                  |
| Guideline 401K ⇒<br>Vanguard Total Bond Market Index [MF]                  | SP           | \$1,001 - \$15,000    | Capital Gains         | \$1 - \$200                          | \$1 - \$200                  |
| Guideline 401K ⇒<br>Vanguard Total Stock Market Index [MF]                 | SP           | \$1,001 - \$15,000    | Capital Gains         | \$1 - \$200                          | \$1 - \$200                  |
| Invesco SEP IRA ⇒<br>Invesco American Franchise Fund [MF]                  | SP           | \$1,001 - \$15,000    | Capital Gains         | None                                 | \$2,501 - \$5,000            |
| Invesco SEP IRA ⇒<br>Invesco Convertible Securities Fund [MF]              | SP           | \$1,001 - \$15,000    | Capital Gains         | None                                 | \$1,001 - \$2,500            |
| Invesco SEP IRA ⇒<br>Invesco Health Care Fund [MF]                         | SP           | \$1,001 - \$15,000    | Capital Gains         | None                                 | \$2,501 - \$5,000            |
| Invesco SEP IRA ⇒<br>Invesco Main Street All Cap Fund [MF]                 | SP           | \$1,001 - \$15,000    | Capital Gains         | None                                 | \$1 - \$200                  |
| Invesco SEP IRA ⇒  | SP           | \$1,001 - \$15,000    | Capital Gains         | None                                 | \$2,501 - \$5,000            |

| <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> |
|---|--------------|-----------------------|---------------------------|--------------------------------------|------------------------------|
| Invesco Technology Fund [MF]  |              |                       |                           |                                      |                              |
| Invisible Technologies Inc. [OL]  | SP           | \$1,001 - \$15,000    | None                      |                                      |                              |
| LOCATION: San Francisco, CA, US<br>DESCRIPTION: 1,000 shares in technology startup.   |              |                       |                           |                                      |                              |
| Koloc Inc., 100% Interest [OL]  | SP           | None                  | See Earned Income Entries | \$15,001 - \$50,000                  | \$100,001 - \$1,000,000      |
| LOCATION: Pelham, NY, US<br>DESCRIPTION: This is a consulting business that generates income, but the equity of the company holds no value because it is a services business. |              |                       |                           |                                      |                              |
| Shares in Getro, Inc. [OL]  | SP           | \$1,001 - \$15,000    | None                      |                                      |                              |
| LOCATION: New York City, NY, US<br>DESCRIPTION: 80,000 shares of Getro, Inc.  |              |                       |                           |                                      |                              |
| Solana [OT]   | SP           | \$1,001 - \$15,000    | Capital Gains             | \$1,001 - \$2,500                    | None                         |
| DESCRIPTION: Held 77 Solana on Coinbase and sold on May 8 for \$1,426.82 (will be reported on Schedule B).  |              |                       |                           |                                      |                              |
| TIAA-CREF ⇒<br>CREF Equity Index R3 [MF]  |              | \$1,001 - \$15,000    | None                      |                                      |                              |
| TIAA-CREF ⇒<br>CREF Money Market R3 [MF]  |              | \$1,001 - \$15,000    | Capital Gains             | None                                 | \$1 - \$200                  |
| TIAA-CREF ⇒<br>CREF Stock R3 [MF]   |              | \$1,001 - \$15,000    | None                      |                                      |                              |
| TIAA-CREF ⇒<br>TIAA Acc High-Yield T1 [MF]  |              | \$1,001 - \$15,000    | Capital Gains             | None                                 | \$1 - \$200                  |
| TIAA-CREF ⇒<br>TIAA Acc Sh-Term Bond T1 [MF]  |              | \$1,001 - \$15,000    | Capital Gains             | None                                 | \$1 - \$200                  |
| TIAA-CREF ⇒<br>TIAA Real Estate [MF]  |              | \$15,001 - \$50,000   | Capital Gains             | \$1,001 - \$2,500                    | \$201 - \$1,000              |

\* 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 |
|-----------------------|--------------------------------------|-------------------------------|-----------------------|
| New York State Senate | My Salary                            | \$110,000.00                  | \$110,000.00          |
| Inboxlab Inc.         | Spouse salary                        | \$312,000.00                  | \$142,045.45          |
| Koloc Inc.            | Spouse Salary (self employed)        | \$24,836.00                   | \$193,253.88          |
| Koloc Inc.            | Spouse Distributions (self employed) | \$11,500.00                   | \$107,000.00          |
| Inboxlab Inc.         | Spouse Bonus                         | N/A                           | \$75,000.00           |

## SCHEDULE D: LIABILITIES

| Owner   | Creditor               | Date Incurred                                      | Type                               | Amount of Liability   |
|---|------------------------|--|------------------------------------|-----------------------|
|   | Navient                | August 2009 - May 2012 (Period of time I attended) | Law School Student Loan            | \$100,001 - \$250,000 |
| JT  | J.P. Morgan Chase Bank | Multiple months                                    | Chase Sapphire Reserve Credit Card | \$15,001 - \$50,000   |
| COMMENTS: Monthly credit card monthly balances typically range from \$15-25K. |                        |  |                                    |                       |

## SCHEDULE E: POSITIONS

| Position               | Name of Organization  |
|------------------------|-----------------------|
| New York State Senator | New York State Senate |

## 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 Fidelity Brokerage Account (Owner: SP)  
LOCATION: US
- o Fidelity Rollover IRA (Owner: SP)
- o Fidelity Roth IRA (Owner: SP)
- o Guideline 401K (Owner: SP)

- Invesco SEP IRA (Owner: SP)  
DESCRIPTION: Self employment IRA
- TIAA-CREF

## 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

## COMMENTS

## 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:** Alessandra Biaggi , 06/16/2022