Filing ID #10053778

Financial Disclosure Report

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Filer Information

Name: Hon. Nicholas Joseph Lalota
Status: Member
State/District: NY01

Filing Information

Filing Type: New Filer Report
Filing Year: 2022
Filing Date: 08/11/2023

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
495 Consulting Group, LLC., 100% Interest [OL] Location: Suffolk County, NY, US Description: No revenue in 2022. No assets.		None	None		
Brighthouse Financial 403(b) ⇒ Fidelity VIP Equity-Income Portfolio [HE] Description: Meets definition of EIF and assets are publicly available.	SP	$1,001 - $15,000	None		
Brighthouse Financial 403(b) ⇒ Frontier Mid Cap Growth Portfolio Class D [HE] Description: Meets definition of EIF and assets are publicly available.	SP	$15,001 - $50,000	None		
Brighthouse Financial 403(b) ⇒ Loomis Sayles Growth Portfolio [HE] Description: Meets definition of EIF and assets are publicly available.	SP	$15,001 - $50,000	None		
Brighthouse Financial 403(b) ⇒ MFS Research International Portfolio [HE] Description: Meets definition of EIF and assets are publicly available.	SP	$1,001 - $15,000	None		
Brighthouse Financial 403(b) ⇒ MFS Total Return Portfolio [HE] Description: Meets definition of EIF and assets are publicly available.	SP	$1,001 - $15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Brighthouse Financial 403(b) ⇒ T. Rowe Price Small Cap Growth Portfolio [HE] DESCRIPTION: Meets definition of EIF and assets are publicly available.	SP	$15,001 - $50,000	None		
Brighthouse Financial 403(b) ⇒ Western Asset Management U.S. Government Portfolio [HE] DESCRIPTION: Meets definition of EIF and assets are publicly available.	SP	$1,001 - $15,000	None		
New York State Employee Retirement System [DB] DESCRIPTION: Defined Benefit plan to be received upon eligibility.		Undetermined	None		
SUFFOLK COUNTY PUBLIC EMPLOYEES DEFERRED COMPENSATION PLAN ⇒ T. Rowe Price Emerging Europe [MF] DESCRIPTION: Assets publicly available.		$15,001 - $50,000	None		
SUFFOLK COUNTY PUBLIC EMPLOYEES DEFERRED COMPENSATION PLAN ⇒ T. Rowe Price Latin America [MF] DESCRIPTION: Assets publicly available.		$15,001 - $50,000	None		
SUFFOLK COUNTY PUBLIC EMPLOYEES DEFERRED COMPENSATION PLAN ⇒ T. Rowe Price Retire 2045 Tr F [MF] DESCRIPTION: assets publicly available.		$1 - $1,000	None		
TD Ameritrade IRA ⇒ Cash [IH] DESCRIPTION: Cash.	SP	$1,001 - $15,000	Interest	$1 - $200	$1 - $200
TDAmeritrade IRA ⇒ Cash [IH] DESCRIPTION: Cash. COMMENTS: Cash.		$100,001 - $250,000	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
Northport-East Northport UFSD	Spouse Salary	N/A	N/A
Suffolk County	Salary	N/A	$128,821.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Navy Federal Credit Union	July 2019	Home Mortgage.	$500,001 - $1,000,000

Schedule E: Positions

Position	Name of Organization
Chief of Staff Comments: 2022.	Suffolk County Legislature
Elections Commissioner Comments: 2015-2021.	Suffolk County
Treasurer	US Naval Academy - Class of 2000
Vice Commander	Veterans of Foreign Wars - Post 7223
Owner	495 Consulting Group, LLC.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
January 2015	Suffolk County and me.	Deferred Compensation plan investment offered by my former employer, Suffolk County.
Comments: I no longer contribute to this.		
September 2010	New York State and me.	Defined Benefit plan to be received upon eligibility.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

None disclosed.

Schedule A Asset Class Details

- Brighthouse Financial 403(b) (Owner: SP)

- SUFFOLK COUNTY PUBLIC EMPLOYEES DEFERRED COMPENSATION PLAN
- TD Ameritrade IRA (Owner: SP)
- TDAmeritrade IRA

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: Hon. Nicholas Joseph Lalota , 08/11/2023