



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Robert J. Menendez  
**Status:** Congressional Candidate  
**State/District:** NJ08

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2022  
**Filing Date:** 06/13/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Art.sy, Inc. [PS] DESCRIPTION: Private shares in former employer.	SP	Undetermined	None		
Artsy - 401(K) ⇒ Vanguard Target Retirement 2055 Fund - Investor Class (VFFVX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Charles Schwab - Brokerage ⇒ Charles Schwab Bank [BA]	JT	\$1 - \$1,000	None		
Charles Schwab - Brokerage ⇒ SCHWAB FUNDAMENTAL INL LARGE COM ETF (FNDF) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab - Brokerage ⇒ Schwab Fundamental U.S. Large Company Index ETF (FNDX) [EF]	JT	\$1,001 - \$15,000	None		
Charles Schwab - Brokerage ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]	JT	\$1,001 - \$15,000	None		
Charles Schwab - Brokerage ⇒ Schwab U.S. TIPs ETF (SCHP) [EF]	JT	\$1,001 - \$15,000	None		

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Charles Schwab - Brokerage ⇒ VANGUARD MUNI BND TAX EXEMPT ETF (VTEB) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab - Brokerage #1 ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Charles Schwab - Brokerage #1 ⇒ BlackRock Technology Opportunities Fund Investor A Shares (BGSAX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab - Brokerage #1 ⇒ Ford Motor Company (F) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab - Brokerage #1 ⇒ NUVEEN HIGH YIELD MUNICIPAL BOND A (NHMAX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab - Brokerage #1 ⇒ NUVEEN NJ MUNICIPAL BOND A (NNJAX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab - Brokerage #1 ⇒ Palantir Technologies Inc. Class A (PLTR) [ST]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #1 ⇒ Salesforce, Inc. (CRM) [ST]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #1 ⇒ SCHWAB US SMALL CAP ETF (SCHA) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab - Brokerage #1 ⇒ VANGUARD SMALL CAP ETF (VB) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab - Brokerage #1 ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ Charles Schwab Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Charles Schwab - Brokerage #2 ⇒ Invesco FTSE RAFI Developed Markets ex-U.S. (PXF) [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

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Charles Schwab - Brokerage #2 ⇒ Invesco FTSE RAFI Developed Markets ex-U.S. Small-Mid ETF (PDN) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab - Brokerage #2 ⇒ ISHARES CORE MSCI EMERGING ETF (IEMG) [EF]		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ ISHARES CORE US REIT ETF (IV) [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab - Brokerage #2 ⇒ ISHARES GOLD ETF (IAU) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ SCHWAB EMERGING MARKETS EQUITY ETF (SCHE) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab - Brokerage #2 ⇒ SCHWAB FUNDA EMG MKTS LARGE COM ETF (FNDE) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ Schwab Fundamental International Large Company Index ETF (FNDF) [EF]		\$15,001 - \$50,000	None		
Charles Schwab - Brokerage #2 ⇒ SCHWAB FUNDAMENTAL INTL SMAL COM ETF (FNDC) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ SCHWAB FUNDAMENTAL US LARGE CO ETF (FNDX) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ SCHWAB FUNDAMENTAL US SMALL COM ETF (FNDA) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab - Brokerage #2 ⇒ SCHWAB INTERNATIONAL EQUITY ETF (SCHF) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ Schwab International Small-Cap Equity ETF (SCHC) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

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Schwab U.S. REIT ETF (SCHH) [EF]					
Charles Schwab - Brokerage #2 ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ Schwab U.S. TIPs ETF (SCHP) [EF]		\$1,001 - \$15,000	Capital Gains	None	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ SCHWAB US LARGE CAP ETF (SCHX) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ SPDR BLOOMBG EMG MRKT LCL BND ETF (EBND) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab - Brokerage #2 ⇒ SPDR Nuveen Bloomberg Municipal Bond ETF (TFI) [EF]		None	Capital Gains	None	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ VANECK J P MORGAN EM LCLCRY BND ETF (EMLC) [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab - Brokerage #2 ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Capital Gains	None	\$201 - \$1,000
Charles Schwab - Brokerage #2 ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ Vanguard Tax-Exempt Bond ETF (VTEB) [EF]		\$1,001 - \$15,000	None		
Charles Schwab - Brokerage #2 ⇒ VGRD FTSE ALL WRLD EX USSML CAP ETF (VSS) [EF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Charles Schwab - Brokerage #2 ⇒ XTRACKERS INTER REAL EST ETF (HAUZ) [EF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Charles Schwab - IRA Contributory ⇒ Charles Schwab Bank [BA]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ INVESCO FTSE RAFI EMERGING MARKETS ETF (PXH) [EF]		\$1 - \$1,000	Tax-Deferred		

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Charles Schwab - IRA Contributory ⇒ iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]		\$1 - \$1,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab Emerging Markets Equity ETF (SCHE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental Emerging Markets Large Company Index ETF (FNDE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental International Large Company Index ETF (FNDF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental International Small Company Index ETF (FNDC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental U.S. Large Company Index ETF (FNDX) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab Fundamental U.S. Small Company Index ETF (FNDA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ SCHWAB INTERMEDIATE TERM US TRS ETF (SCHR) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab International Equity ETF (SCHF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ SCHWAB INTERNATNAL SMALLCAP EQY ETF (SCHC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab U.S. Large-Cap ETF (SCHX) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Schwab U.S. Small-Cap ETF (SCHA) [EF]		\$1,001 - \$15,000	Tax-Deferred		

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Charles Schwab - IRA Contributory ⇒ SCHWAB US TIPS ETF (SCHP) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ VANGUARD GLBAL EX US REAL ESTATE ETF (VNQI) [EF]		\$1 - \$1,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ VANGUARD INTERMEDIATE TERM COR ETF (VCIT) [EF]		\$1 - \$1,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ VANGUARD MORTGAGE BACKEDSEC ETF (VMBS) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab - IRA Contributory ⇒ Xtrackers International Real Estate ETF (HAUZ) [EF]		\$1 - \$1,000	Tax-Deferred		
Charles Schwab Checking [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Charles Schwab Savings [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Chase Checking [BA]	SP	\$1,001 - \$15,000	Interest	None	\$1 - \$200
Chase Savings [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Goldman Sachs - Brokerage ⇒ FDIC Cash [BA]	SP	\$1 - \$1,000	None		
Goldman Sachs - Brokerage ⇒ iShares National Muni Bond ETF (MUB) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard Global ex-US Real Estate ETF (VNQI) [EF]	SP	\$1 - \$1,000	Dividends	None	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard Mid Cap ETF (VO) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

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Goldman Sachs - Brokerage ⇒ Vanguard Mid Cap Value ETF (VOE) [EF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard REIT ETF (VNQ) [EF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard Small Cap ETF (VB) [EF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard Small Cap Value ETF (VBR) [EF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs - Brokerage ⇒ Vanguard Value ETF (VTV) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Goldman Sachs - IRA ⇒ FDIC Cash [BA]	SP	\$1 - \$1,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ SPDR Barclays Capital High Yield Bond ETF (JNK) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard Global ex-US Real Estate ETF (VNQI) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard Mid Cap ETF (VO) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard Mid Cap Value ETF (VOE) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard REIT ETF (VNQ) [EF]	SP	\$1 - \$1,000	Tax-Deferred		

<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>
Goldman Sachs - IRA ⇒ Vanguard Small Cap ETF (VB) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard Small Cap Value ETF (VBR) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Goldman Sachs - IRA ⇒ Vanguard Value ETF (VTV) [EF]	SP	\$1 - \$1,000	Tax-Deferred		
Lowenstein Sandler - Vanguard - 401(K) ⇒ Columbia Dividend Income Fund Institutional 3 Class (CDDYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Information Technology Index Fund Admiral Shares (VITAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Mid-Cap Index Fund Admiral Shares (VIMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Small-Cap Index Fund Admiral Shares (VSMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Lowenstein Sandler - Vanguard - 401(K) ⇒ Vanguard Target Retirement 2050 Trust II (VFIFX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Peek - 401(K) ⇒ Vanguard REIT Index Admiral (VGSLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Peek - 401(K) ⇒ Vanguard Total Bond Market Index Admiral (VBTLX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Peek - 401(K) ⇒ Vanguard Total International Bond Index Admiral (VTABX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Peek - 401(K) ⇒ Vanguard Total International Stock Index Fund Admiral Shares (VTIAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Peek - 401(K) ⇒ Vanguard Total Stock Market Index Fund Admiral Shares (VTSAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Peek Travel, Inc. [OP] DESCRIPTION: Options in current company (vested and unvested)	SP	Undetermined	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
Lowenstein Sandler LLP	Salary	\$172,902.99	\$456,120.06
Peek.com	Spouse salary	N/A	N/A
Artsy.net	Spouse salary	N/A	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Citibank, N.A.	June 2020	Mortgage on primary residence	\$500,001 - \$1,000,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Commissioner	Port Authority of New York and New Jersey
Trustee	The Hudson School

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Artsy - 401(K) (Owner: SP)
- Charles Schwab - Brokerage (Owner: JT)  
LOCATION: US
- Charles Schwab - Brokerage #1  
LOCATION: US
- Charles Schwab - Brokerage #2  
LOCATION: US
- Charles Schwab - IRA Contributory
- Goldman Sachs - Brokerage (Owner: SP)  
LOCATION: US
- Goldman Sachs - IRA (Owner: SP)
- Lowenstein Sandler - Vanguard - 401(K)
- Peek - 401(K) (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

## 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:** Hon. Robert J. Menendez , 06/13/2023