



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Josh McConkey  
**Status:** Congressional Candidate  
**State/District:** NC13

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2023  
**Filing Date:** 03/19/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank Account [BA]		\$15,001 - \$50,000	None		
Bank Account [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Bank Account [BA]		\$15,001 - \$50,000	None		
Bank Account [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$201 - \$1,000
College Tuition Plan ⇒ College Tuition Plan [5P]		\$15,001 - \$50,000	None		
LOCATION: FL					
College Tuition Plan ⇒ College Tuition Plan [5P]		\$15,001 - \$50,000	None		
LOCATION: FL					
College Tuition Plan ⇒ College Tuition Plan [5P]		\$15,001 - \$50,000	None		
LOCATION: FL					

<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>
Cryptocurrency ⇒ <b>ETH [OT]</b>  DESCRIPTION: Cryptocurrency		\$1,001 - \$15,000	None		
Cryptocurrency ⇒ <b>UniCoin [OT]</b>  DESCRIPTION: Cryptocurrency		\$1,001 - \$15,000	None		
<b>Home [RP]</b>  LOCATION: Adelaide, AU	<b>JT</b>	\$1,000,001 - \$5,000,000	None		
Individual 401k (Elsa) ⇒ <b>Credit Suisse X-Links Gold Shares Covered Call ETNs due February 2, 2033 (GLDI) [ST]</b>		\$1,001 - \$15,000	Tax-Deferred		
Individual 401k (Elsa) ⇒ <b>IWF [EF]</b>		\$1,001 - \$15,000	Tax-Deferred		
Individual 401k (Elsa) ⇒ <b>VFIAX [MF]</b>		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (Elsa) ⇒ <b>VOO [EF]</b>		\$1,001 - \$15,000	Tax-Deferred		
Individual 401k (FLP) ⇒ <b>Apple Inc. (AAPL) [ST]</b>		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (FLP) ⇒ <b>FREL [EF]</b>		\$1,001 - \$15,000	Tax-Deferred		
Individual 401k (FLP) ⇒ <b>IVV [EF]</b>		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (FLP) ⇒ <b>IWF [EF]</b>		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (FLP) ⇒ <b>VFIAX [MF]</b>		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (MEP) ⇒ <b>American Express Company (AXP) [ST]</b>		\$100,001 - \$250,000	Tax-Deferred		
Individual 401k (MEP) ⇒		\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apple Inc. (AAPL) [ST]		\$100,000			
Individual 401k (MEP) ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$100,001 - \$250,000	Tax-Deferred		
Individual 401k (MEP) ⇒ Credit Suisse X-Links Gold Shares Covered Call ETNs due February 2, 2033 (GLDI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Individual 401k (MEP) ⇒ GLD [EF]		\$1,001 - \$15,000	Tax-Deferred		
Individual 401k (MEP) ⇒ IWF [EF]		\$50,001 - \$100,000	Tax-Deferred		
Individual 401k (MEP) ⇒ Palo Alto Networks, Inc. (PANW) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Individual 401k (MEP) ⇒ VFIAX [MF]		\$50,001 - \$100,000	Tax-Deferred		
Individual 401k (MEP) ⇒ VOO [EF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Credit Suisse X-Links Gold Shares Covered Call ETNs due February 2, 2033 (GLDI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ IWF [EF]		\$50,001 - \$100,000	Tax-Deferred		
IRA ⇒ VYM [EF]		\$1,001 - \$15,000	Tax-Deferred		
Kiwisaver ⇒ Kiwisaver [OT] DESCRIPTION: Kiwisaver		\$1,001 - \$15,000	None		
Koru Emergency Physicians PLLC [OL] LOCATION: Georgetown, TX, US DESCRIPTION: Professional Limited Liability Company	JT	\$50,001 - \$100,000	Services	\$15,001 - \$50,000	\$50,001 - \$100,000
ROLLOVER IRA ⇒		\$15,001 - \$50,000	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>
Berkshire Hathaway Inc. New (BRK.B) [ST]					
ROLLOVER IRA ⇒ FREL [EF]		\$1,001 - \$15,000	Tax-Deferred		
ROLLOVER IRA ⇒ HDV [EF]		\$15,001 - \$50,000	Tax-Deferred		
ROLLOVER IRA ⇒ IAU [EF]		\$15,001 - \$50,000	Tax-Deferred		
ROLLOVER IRA ⇒ VOO [EF]		\$15,001 - \$50,000	Tax-Deferred		
ROLLOVER IRA ⇒ VYM [EF]		\$15,001 - \$50,000	Tax-Deferred		
ROLLOVER IRA- ELSA ⇒ VYM [EF]		\$15,001 - \$50,000	Tax-Deferred		
Stocks, ETF, Mutual Funds ⇒ EMLC [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ FNDA [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ FNDX [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Stocks, ETF, Mutual Funds ⇒ HAUZ [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ IAU [EF]		\$1,001 - \$15,000	None		
Stocks, ETF, Mutual Funds ⇒ IEMG [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds ⇒ MUB [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Stocks, ETF, Mutual Funds ⇒ PDN [EF]		\$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
Stocks, ETF, Mutual Funds → PRFZ [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds → PXF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds → PXH [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Stocks, ETF, Mutual Funds → SCHA [EF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds → SCHF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Stocks, ETF, Mutual Funds → SCHH [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds → SCHP [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Stocks, ETF, Mutual Funds → SCHX [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds → VB [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stocks, ETF, Mutual Funds → VSS [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Superannuation → Superannuation [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: SA Superannuation					

\* 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
US Air Force Reserves	Employment	\$15,706.58	\$99,697.68

Source	Type	Amount Current Year to Filing	Amount Preceding Year
DEFENSE FINANCE & ACTG SERV	Employment	\$39,779.24	\$214,858.84
Thales Academy	Spouse Salary	N/A	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Movement Mortgage	June 2021	Home Mortgage	\$500,001 - \$1,000,000
JT	Commonwealth Bank Australia	Jan 2021	Home Mortgage	\$1,000,001 - \$5,000,000
JT	Chase Bank	2022	Credit Card Debt	\$10,000 - \$15,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Commander	US Air Force Reserves
Flight Surgeon	Air Force
Emergency Physician	Koru Emergency Physicians, PLLC
Emergency Consultant	South Australia Health Network

## SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Koru Emergency Physicians, PLLC (Georgetown, TX, US)	Professional Limited Liability Company

## SCHEDULE A ASSET CLASS DETAILS

- o College Tuition Plan  
LOCATION: FL
- o Cryptocurrency  
LOCATION: US
- o Individual 401k (Elsa)

- Individual 401k (FLP)
- Individual 401k (MEP)
- IRA
- Kiwisaver  
LOCATION: US
- ROLLOVER IRA
- ROLLOVER IRA- ELSA
- Stocks, ETF, Mutual Funds  
LOCATION: US
- Superannuation  
LOCATION: US

## **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:** Josh McConkey , 03/19/2023