



Filing ID #10058983

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Chris Pappas  
**Status:** Member  
**State/District:** NH01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 08/13/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America Checking xx23 [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bank of America Savings xx25 [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Fidelity 401K ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Fidelity 401K ⇒ Vanguard Target Retirement 2055 Fund (VFFVX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual Insurance [WU]		None	Unearned Income	None	<input checked="" type="checkbox"/>
Pilgrim Realty ⇒ 207 Hooksett Road [RP] LOCATION: Manchester, NH, US DESCRIPTION: Minority Owner, Real Estate for Family Business		\$250,001 - \$500,000	LLC Income	\$15,001 - \$50,000	<input type="checkbox"/>
Pilgrim Realty ⇒ 865 Maple Street [RP] LOCATION: Manchester, NH, US DESCRIPTION: Minority Owner, Real Estate for Family Business		\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
PNC Bank Checking xx22 [BA]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Puritan Confectionery Co. [OL]		\$1,000,001 - \$5,000,000	LLC Income	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Manchester, NH, US DESCRIPTION: Minority Owner, Family Restaurant Business					
Uber Technologies [RS]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: Restricted stock units were received by spouse as part of his employment compensation. RSUs will fully vest in 2027.					
Uber Technologies, Inc. Common Stock (UBER) [ST]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Restricted stock units were received by spouse as part of his employment compensation. RSUs vested in 2023.					
Wells Fargo IRA ⇒ American Century Small Cap Value Fund - I Class (ACVIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ American Funds New World Fund A (NEWFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ American Funds SMALLCAP World A (SMCWX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ AMG Yacktman Focused Fund - Class I (YAFIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ BlackRock Tactical Opportunities Fund - Institutional (PBAIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ BNY Mellon Natural Resources Fund Class I (DLDRX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ BrandywineGLOBAL Corporate Credit Fund Class I (BCGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Calvert Equity Fund Class I (CEYIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒		None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Columbia Dividend Income Fund Class I (GSFTX) [MF]					<input type="checkbox"/>
Wells Fargo IRA ⇒ Fidelity New Markets Income Fund Class I (FGZMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Hartford Balanced Income Fund Class I (HBLIX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Invesco Developing Markets Fund Class Y (ODVYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ JPMorgan Emerging Markets Equity Fund Class L (JMIEX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ LoCorr Macro Strategies Fund - Class I (LFMIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Loomis Sayles Global Allocation Fund Class Y (LSWWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ MFS International Diversification Fund Class I (MDIJX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ MFS International Value Fund Class I (MINIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Parnassus Value Equity Fund Institutional Shares (PFPWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Thornburg Better World International Fund Class I (TBWIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Victory Sycamore Established Value Fund Class I (VEVIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo IRA ⇒ Virtus AlphaSimplex Managed Futures Strategy Fund Class I (ASFYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Virtus KAR Mid-Cap Growth Fund I (PICMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Virtus NFJ Mid Cap Value Fund Class A (PQNAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Virtus Zevenbergen Innovative Growth Stock Fund I (SCATX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ WmBlair Large Cap Growth Fund Class I (LCGFX) [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>

\* Investment vehicle 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Northwestern Mutual Insurance [WU]  DESCRIPTION: Policy Surrender		07/26/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Wells Fargo IRA ⇒ AMG Yacktman Focused Fund - Class I (YAFIX) [MF]		03/22/2023	P	\$1,001 - \$15,000	
Wells Fargo IRA ⇒ BlackRock Tactical Opportunities Fund - Institutional (PBAIX) [MF]		03/22/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo IRA ⇒ BNY Mellon Natural Resources Fund Class I (DLDRX) [MF]		03/22/2023	P	\$1,001 - \$15,000	
Wells Fargo IRA ⇒ Calvert Equity Fund Class I (CEYIX) [MF]		03/22/2023	P	\$1,001 - \$15,000	
Wells Fargo IRA ⇒ Columbia Dividend Income Fund Class I (GSFTX) [MF]		03/22/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo IRA ⇒ Hartford Balanced Income Fund Class I (HBLIX) [MF]		10/30/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo IRA ⇒ JPMorgan Emerging Markets Equity Fund Class L (JMIEX) [MF]		03/22/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo IRA ⇒ Loomis Sayles Global Allocation Fund Class Y (LSWWX) [MF]		10/30/2023	P	\$1,001 - \$15,000	
Wells Fargo IRA ⇒ MFS International Diversification Fund Class I (MDIJX) [MF]		10/30/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo IRA ⇒ MFS International Value Fund Class I (MINIX) [MF]		10/30/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo IRA ⇒ Parnassus Value Equity Fund Institutional Shares (PFPWX) [MF]		03/22/2023	P	\$1,001 - \$15,000	
Wells Fargo IRA ⇒ Parnassus Value Equity Fund Institutional Shares (PFPWX) [MF]		03/23/2023	P	\$1,001 - \$15,000	
Wells Fargo IRA ⇒ Thornburg Better World International Fund Class I (TBWIX) [MF]		10/30/2023	P	\$1,001 - \$15,000	
Wells Fargo IRA ⇒ Thornburg Better World International Fund Class I (TBWIX) [MF]		10/31/2023	P	\$1,001 - \$15,000	
Wells Fargo IRA ⇒ Virtus Zevenbergen Innovative Growth Stock Fund I (SCATX) [MF]		03/22/2023	P	\$1,001 - \$15,000	
Wells Fargo IRA ⇒ WmBlair Large Cap Growth Fund Class I (LCGFX) [MF]		03/22/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

\* Investment vehicle 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
Uber Technologies	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Puritan Confectionery Co.	September, 2019	Member Stock Purchase Loan	\$250,001 - \$500,000
	Arthur Pappas	December, 2005	Stock Purchase	\$15,001 - \$50,000
	Cross Country Mortgage	July, 2021	Personal Residence Mortgage	\$250,001 - \$500,000
SP	Nelnet	May, 2015	Spouse Student Loan	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Puritan Confectionery Co.
Member	Pilgrim Realty

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>Fidelity 401K (Owner: SP)</li><li>Pilgrim Realty LOCATION: Manchester, NH, US DESCRIPTION: Real Estate Holding Company for Family Business</li></ul>
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- Wells Fargo IRA

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**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. Chris Pappas , 08/13/2024