



Filing ID #10059863

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Scott Perry
Status: Member
State/District: PA10

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/8/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Adams County National Bank [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
American Funds ⇒ American Funds Capital World Growth & Income Fund Class A Shares (CWGIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ American Funds SMALLCAP World A (SMCWX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ Capital Income Builder Cl A Shs (CAIBX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
American Funds ⇒ The Bond Fund of America, Class A Shares (ABNDX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Commonwealth of PA SERS [DB]		Undetermined	Tax-Deferred		<input type="checkbox"/>
Empower Retirement 401k ⇒ T. Rowe Price Retirement 2035 Fund (TRRJX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
LPL Financial ⇒ American Balanced Fund, Class A Shs (ABALX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LPL Financial ⇒ Insured Cash Account - UBS Bank USA [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Members First Credit Union [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Northwestern Mutual [WU]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Pennsylvania 529 Guaranteed Savings Plan [5P] LOCATION: PA	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Pennsylvania 529 Guaranteed Savings Plan [5P] LOCATION: PA	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Pennsylvania State Employees Credit Union [BA]	SP	\$100,001 - \$250,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Residential Rental - Dillsburg, PA [RP] LOCATION: Dillsburg/York, PA, US		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Residential Rental - Harrisburg, PA [RP] LOCATION: Harrisburg/Dauphin, PA, US		\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
US Bank CDs [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vacant land near primary residence [RP] LOCATION: Dillsburg/York, PA, US		\$100,001 - \$250,000	None		<input type="checkbox"/>
Vanguard ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒ Vanguard Lifestrategy Moderate Growth Fund (VSMGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒ Vanguard Total Stock Market Index Fd Admiral Shs (VTSAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard U.S. Growth Fund (VWUSX) [MF]					

* 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?
PA529 GSP [5P] LOCATION: PA DESCRIPTION: Same plan as reported on Schedule A.	SP	08/10/2023	P	\$1,001 - \$15,000	
PA529 GSP [5P] LOCATION: PA DESCRIPTION: Same plan as reported on Schedule A.	SP	08/10/2023	P	\$1,001 - \$15,000	

* 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
Penn State Health	spouse salary	N/A
Pennsylvania State Employees' Retirement System	state retirement - defined benefit	\$14,397.84
Doterra International LLC	spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Members 1st FCU	August 2021	Mortgage on Residential Rental - Harrisburg, PA	\$50,001 - \$100,000
	Members 1st FCU	August 2021	Mortgage on Residential Rental - Dillsburg, PA	\$50,001 - \$100,000
	Members First Federal Credit Union	September 2010	Mortgage on Personal Residence	\$100,001 - \$250,000
	Members 1st FCU	September 2021	Vacant land near primary residence	\$100,001 - \$250,000
	Members 1st FCU	2021	Personal Line of Credit/Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
March 2013	Scott Perry and Pennsylvania State Employee Retirement System	Defined Benefit plan with Pennsylvania

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Conservative Partnership Institute	02/9/2023	02/12/2023	Harrisburg, PA - Orlando, FL - Harrisburg, PA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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">American Funds (Owner: SP)Empower Retirement 401k (Owner: SP)LPL FinancialVanguard (Owner: SP)

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. Scott Perry , 08/8/2024