



Filing ID #10060313

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Claudia Tenney
Status: Member
State/District: NY24

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/10/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Adirondack Financial Services Invest Acct ⇒ Dodge & Cox Income Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Dodge and Cox International Fund [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Dreyfus Ins Deposit Program [BA]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Europacific Gwth Fd Cl-F-2 [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Global X Silver Miners ETF (SIL) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [EF]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ iShares TR Russell 2000ETF (EF) [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ iShares TR Russell Mid-Cap ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Adirondack Financial Services Invest Acct ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Metropolitan West Ttl Ret Bd Fund CL 1 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Metropolitan West Unconstrained BdFd [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ MFS Growth Fund CL 1 [MF]		\$15,001 - \$50,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Morgan Stanley Bank [BA]		None	Tax-Deferred		<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ OakMark Fund Investor Class Fund (MF) [BA]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ SPDR Gold Tr Gold Shs [EF]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ US Treasury Notes 5% [GS]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Vaneck Vectors ETF Tr Gold MIners [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Vanguard Index FDS S & P 500 ETF Shs [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Adirondack Financial Services Invest Acct ⇒ Vanguard S-T Investment Grade Fd (MF) [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Bank of Utica BA [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Mid_York Press Inc. VOYA 401K account ⇒ American Funds Europacific (EF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. VOYA 401K account ⇒ American Funds Growth Fund (EF) [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. VOYA 401K account ⇒		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Columbia BMO Small-Cap Value Fund (EF) [PE]					<input type="checkbox"/>
Mid_York Press Inc. VOYA 401K account ⇒ Prudential High Yield Fund (EF) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. VOYA 401K account ⇒ Vanguard 500 Idx Fund Adm [PE]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. VOYA 401K account ⇒ Vanguard Mid-Cap Index Fund Adm (EF) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Mid_York Press Inc. VOYA 401K account ⇒ Voya Intermediate Bond Fund (EF) [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Clearbridge Apprec. C (MF) [BA]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Clearbridge Appreciation A (EF) [BA]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Morgan Stanley Bank NA (BA) [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Berkshire Hathaway CL B New (MF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge Aggressive Growth Fd (EF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge Appreciation A (EF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge International Value A (EF) [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Trad. IRA ⇒ Clearbridge Value Trust A (EF) [BA]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
The (US Govt) Thrift Savings Plan [PE]		\$100,001 - \$250,000	Tax-Deferred		<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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Adirondack Financial Services Invest Acct ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]		09/8/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ American Europacific Growth Fund Class F2 [BA]		04/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ American Europacific Growth Fund Class F2 [BA]		09/8/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Clearbridge Appreciation C [IR]		01/17/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Dodge & Cox Income Fund - Class I (DODIX) [MF]		12/7/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Dodge & Cox Income Fund - Class I (DODIX) [MF]		09/8/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Dodge & Cox Income Fund - Class I (DODIX) [MF]		12/7/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Dodge & Cox International Stock Fund - Class I (DODFX) [MF]		04/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Dodge & Cox International Stock Fund - Class I (DODFX) [MF]		09/8/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Global X Silver Miners ETF (SIL) [EF]		12/7/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [EF]		12/7/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [EF]		06/7/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ iShares Russell 2000 ETF Option Class I (IOWIX) [MF]		04/5/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒		04/27/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares Russell 2000 ETF Option Class I (IOWIX) [MF]					<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ iShares Russell 2000 ETF Option Class I (IOWIX) [MF]		09/8/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Acct ⇒ iShares Russell Mid-Cap Index Fund - Class A (BRMAX) [MF]		04/5/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Acct ⇒ iShares Russell Mid-Cap Index Fund - Class A (BRMAX) [MF]		04/27/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Acct ⇒ iShares Russell Mid-Cap Index Fund - Class A (BRMAX) [MF]		09/8/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Acct ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]		04/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]		12/7/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]		09/8/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]		12/7/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Metropolitan West Total Return Bond Fd Cl I (MWTIX) [MF]		12/7/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Metropolitan West Unconstrained Bond Fd Cl I Shs (MWCIX) [MF]		12/7/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Metropolitan West Unconstrained Bond Fd Cl I Shs (MWCIX) [MF]		09/8/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Metropolitan West Unconstrained Bond Fd Cl I Shs (MWCIX) [MF]		12/7/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ MFS Growth Fund Class I (MFEIX) [MF]		04/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley Investment Acct ⇒ MFS Growth Fund Class I (MFEIX) [MF]		09/8/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Acct ⇒ MFS Growth Fund Class I (MFEIX) [MF]		04/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Oakmark Fund Investor Class (OAKMX) [MF]		04/27/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Oakmark Fund Investor Class (OAKMX) [MF]		09/8/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Oakmark Fund Investor Class (OAKMX) [MF]		09/8/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Vanguard Index Trust 500 Index Fund (VFINX) [MF]		04/5/2023	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Vanguard Index Trust 500 Index Fund (VFINX) [MF]		04/27/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Vanguard Index Trust 500 Index Fund (VFINX) [MF]		09/8/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Vanguard Investment Grade Fund [BA]		09/8/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Acct ⇒ Vanguard Investment Grade Fund [BA]		12/7/2023	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
U.S. House Of Representatives	Wages	\$183,367.00
Mid York Press	Wages	\$25,527.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Rocket Mortgage	June 2023	Home Mortgage	\$250,001 - \$500,000
	Truist Bank	2022	Auto Loan	\$15,001 - \$50,000
	Rocket Mortgage	February 2022	Home mortgage	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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?
UK Marshall Scholars	01/12/2023	01/17/2023	Washington - London - Washington	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Saudi Arabia MECEA, US Congressional Education Exchange	02/12/2023	03/17/2023	Washington, DC - Riyadh - Washington	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
House Democracy Partnership - Rep. Buchanan	04/28/2023	05/8/2023	Washington - South Korea, Indonesia, UAE, North Macedonia, Poland - Washington	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CODEL Kelly - House Armed Services Committee	08/4/2023	08/13/2023	Washington - Alaska, Japan, Vietnam, Singapore, Australia - Washington	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Adirondack Financial Services Invest Acct
LOCATION: US
DESCRIPTION: Adirondack Financial Investment Acct
- Mid_York Press Inc. VOYA 401K account
- Morgan Stanley Investment Acct
LOCATION: US
- Morgan Stanley Trad. IRA
DESCRIPTION: Morgan Stanley Traditional 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. Claudia Tenney , 08/10/2024