



Filing ID #10060364

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Nicholas Joseph Lalota
Status: Member
State/District: NY01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/9/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
495 Consulting Group, LLC., 100% Interest [OL] LOCATION: Suffolk County, NY, US DESCRIPTION: No revenue in 2023. No assets.		None	None		<input type="checkbox"/>
Brighthouse Financial 403(b) ⇒ Fidelity VIP Equity-Income Portfolio [HE] DESCRIPTION: Meets definition of EIF and assets are publicly available.	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Brighthouse Financial 403(b) ⇒ Frontier Mid Cap Growth Portfolio Class D [HE] COMMENTS: Meets definition of EIF and assets are publicly available.	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Brighthouse Financial 403(b) ⇒ Loomis Sayles Growth Portfolio [HE] DESCRIPTION: Meets definition of EIF and assets are publicly available.	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Brighthouse Financial 403(b) ⇒ MFS Research International Portfolio [HE] DESCRIPTION: Meets definition of EIF and assets are publicly available.	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Brighthouse Financial 403(b) ⇒ MFS Total Return Portfolio [HE] DESCRIPTION: Meets definition of EIF and assets are publicly available.	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brighthouse Financial 403(b) ⇒ T. Rowe Price Small Cap Growth Portfolio [HE]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Meets definition of EIF and assets are publicly available.					
Brighthouse Financial 403(b) ⇒ Western Asset Management U.S. Government Portfolio [HE]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Meets definition of EIF and assets are publicly available.					
New York State Employee Retirement System [DB]		Undetermined	None		<input type="checkbox"/>
DESCRIPTION: Defined Benefit plan to be received upon eligibility.					
Roth Contributory IRA (Charles Schwab) ⇒ Cash [IH]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Roth Contributory IRA (Charles Schwab) ⇒ SPDR Gold Trust (GLD) [EF]		\$50,001 - \$100,000	None		<input type="checkbox"/>
SUFFOLK COUNTY PUBLIC EMPLOYEES DEFERRED COMPENSATION PLAN ⇒ T. Rowe Price Latin America Fund (PRLAX) [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Assets publicly available.					
SUFFOLK COUNTY PUBLIC EMPLOYEES DEFERRED COMPENSATION PLAN ⇒ T. Rowe Price Retirement 2045 Fund - I Class (TRIKX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: T. Rowe Price Retire 2045 Tr F Assets publicly available.					
TD Ameritrade IRA ⇒ Cash [IH]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Cash.					

* 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?
Roth Contributory IRA (Charles Schwab) ⇒ SPDR Gold Trust (GLD) [EF]		01/2/2023	P	\$100,001 - \$250,000	
SUFFOLK COUNTY PUBLIC EMPLOYEES DEFERRED COMPENSATION PLAN ⇒		12/19/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

T. Rowe Price Emerging Europe Fund - I Class (TTEEX) [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 C: EARNED INCOME

Source	Type	Amount
US House of Representatives	Member Salary	\$174,000.00
Northport-East Northport UFSD	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Navy Federal Credit Union	July 2019	Home Mortgage.	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Treasurer	US Naval Academy - Class of 2000
Owner	495 Consulting Group, LLC.
Vice Commander	Veterans of Foreign Wars - Post 7223

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2015	Suffolk County and me.	Deferred compensation plan investment offered by my former employer, Suffolk County.
COMMENTS: I no longer contribute to this.		
September 2010	New York State and me.	Defined benefit plan to be received upon eligibility.

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

- Brighthouse Financial 403(b) (Owner: SP)
- Roth Contributory IRA (Charles Schwab)
- SUFFOLK COUNTY PUBLIC EMPLOYEES DEFERRED COMPENSATION PLAN
- TD Ameritrade IRA (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. Nicholas Joseph Lalota , 08/9/2024