



Filing ID #10062529

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Alexander Xavier Mooney
Status: Member
State/District: WV02

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/12/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ AmFds Euro Pacfc Gr R6 [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Delaware Value Fd Cl I (DDVIX) [MF]		None	None		<input checked="" type="checkbox"/>
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Fid Puritan [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Rssl Sm Cap Index [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ SP 500 Index [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ SP Md Cap Index [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ TRowe Price Mid Cap Val [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ TRowPR StrcdRsrch CMN Tr [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ William Blair Large Cap Growth Fund Class R6 (LCGJX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ WlmBlr Lg Cap Gr CIF 5 [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
TIAA Traditional [FN]	SP	\$15,001 - \$50,000	None		<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?
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ Delaware Value Fd Cl I (DDVIX) [MF] DESCRIPTION: Was listed on previous filing as DE Val Inst		12/8/2023	E	\$1,001 - \$15,000	
Maryland Supplemental Retirement Plan (401k) (Nationwide) ⇒ William Blair Large Cap Growth Fund Class R6 (LCGJX) [MF] DESCRIPTION: Acquired through an exchange with De Val Inst		12/8/2023	E	\$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
GGM Consulting	Wife, consultant	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Congressional Federal Credit Union	September 2017	Mortgage on Primary Residence, Charles Town, WV	\$250,001 - \$500,000
JT	Capitol One	April 2023	Credit Card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2006	Myself and the State of Maryland	Legislative Pension Plan Participant

SCHEDULE G: GIFTS

Source	Description	Value
Roy Hinman (Augustina, FL, US)	Donation Legal Expense Fund	\$5,000.00
Honeygo Petro Inc. (Owing Mills, MD, US)	Donation Legal Expense Fund	\$5,000.00
Americans For Legislating Excellence PAC (Martinsburg, WV, US)	Donation Legal Expense Fund	\$5,000.00
Anatnal LLC (Lantana, FL, US)	Donation Legal Expense Fund	\$5,000.00
Island Doctors (St. Augustine, FL, US)	Donation Legal Expense Fund	\$5,000.00
Liberty Auto Service Inc (Randallstown, MD, US)	Donation Legal Expense Fund	\$3,500.00
Ann L Johnson (Palm Beach, FL, US)	Donation Legal Expense Fund	\$5,000.00
Charles Johnson (Palm Beach, FL, US)	Donation Legal Expense Fund	\$5,000.00
John Dwyer (Melbourne Beach, FL, US)	Donation Legal Expense Fund	\$5,000.00
Brian Rapp (West Palm Beach, FL, US)	Donation Legal Expense Fund	\$1,000.00
Fightin Ninth PAC (Richmond, VA, US)	Donation Legal Expense Fund	\$1,000.00
Washington Professional Rugby (Washington, DC, US)	Donation Legal Expense Fund	\$5,000.00
Lasco Properties USA, LLC (Tustin, CA, US)	Donation Legal Expense Fund	\$5,000.00
Kenneth Fischer (Plano, TX, US)	Donation Legal Expense Fund	\$5,000.00

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Republic of China (Taiwan)	08/24/2023	08/31/2024	West Palm Beach, FL - Taipei - Dulles Airport	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Conservative Partnership	02/9/2023	07/12/2023	Washington, D.C. -	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Institute			Orlando, FL - Washington, DC				
Club for Growth	03/2/2023	03/4/2023	Washington, D.C. - Palm Beach, Florida - Washington, DC	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

- Maryland Supplemental Retirement Plan (401k) (Nationwide)

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. Alexander Xavier Mooney , 08/12/2024