Filing ID #10059196

Financial Disclosure Report

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Filer Information

Name: Hon. Michael John Gallagher
Status: Former Member
State/District: WI08

Filing Information

Filing Type: Terminated Filer Report
Filing Year: 2024
Filing Date: 08/22/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
529 FBO Minor 1 ⇒ 529 WI Voya 529 Age 0-4 Option Class A (VWVAX) [MF]		$1,001 - $15,000	Tax-Deferred		☑
529 FBO Minor 2 ⇒ 529 WI Voya 529 Age 0-4 Option Class A (VWVAX) [MF]		$1,001 - $15,000	Tax-Deferred		☑
529 FBO Minor 2 ⇒ 529 WI Voya 529 Age 0-4 Option Class C (VWVBX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
Barclays Bank savings account [BA]	SP	$50,001 - $100,000	Interest	$2,501 - $5,000	☐
Chase Bank [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	☐
Clearbridge Large Cap Growth [MF]	JT	$250,001 - $500,000	Capital Gains	$15,001 - $50,000	☑
Delaware IVY Science and Technology [MF]	JT	$50,001 - $100,000	Capital Gains	$5,001 - $15,000	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Ford Interest Advantage [BA]	SP	$50,001 - $100,000	Interest	$2,501 - $5,000	☐
Invesco Equal Weight S&P 500 [MF]	JT	$250,001 - $500,000	Capital Gains, Dividends	$5,001 - $15,000	☑
iShares Russell 1000 Value ETF [EF]	JT	None	Capital Gains	$1,001 - $2,500	☑
John Hancock 401k ⇒ Institutional Index Fund [MF]	SP	$50,001 - $100,000	Tax-Deferred		☐
John Hancock 401k ⇒ New Horizons Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
John Hancock 401k ⇒ Retirement 2040 Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
John Hancock 401k ⇒ Retirement 2050 Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
John Hancock 401k ⇒ Small Cap Value Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
MFS Value Fund [MF]	JT	$250,001 - $500,000	Capital Gains, Dividends	$15,001 - $50,000	☑
Morgan Stanley Cash Equivalent Account [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	☐
Morgan Stanley IRA - SP ⇒ iShares Core MSCI EAFE ETF [MF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Morgan Stanley IRA - SP ⇒ iShares Core MSCI Emerging Markets ETF [MF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Morgan Stanley IRA - SP ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	$1,001 - $15,000	Tax-Deferred		☑
Morgan Stanley IRA - SP ⇒ iShares Russell 1000 Growth ETF [MF]	SP	$15,001 - $50,000	Tax-Deferred		☑
Morgan Stanley IRA - SP ⇒ iShares Russell 1000 Value ETF [MF]	SP	$15,001 - $50,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Morgan Stanley IRA - SP ⇒ iShares Russell Mid-Cap Growth ETF (IWP) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Morgan Stanley IRA - SP ⇒ iShares Russell Mid-Cap Value ETF (IWS) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Roth IRA ⇒ Hartford Equity Inc [MF]		$1,001 - $15,000	Tax-Deferred		☐
Roth IRA ⇒ PGIM Jennison Gowth Z (PJFZX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
Roth IRA ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]		$1,001 - $15,000	Tax-Deferred		☑
Roth IRA ⇒ Vanguard Large-Cap ETF - DNQ (VV) [ST]		$1,001 - $15,000	Tax-Deferred		☐
Roth IRA ⇒ Wisdomtree US Largecap Div Fnd (DLN) [MF]		$1,001 - $15,000	Tax-Deferred		☐
Talcott Resolution Life and Annuity Insurance Company [WU]		$100,001 - $250,000	None		☐
USAA Bank Account [BA]		$1,001 - $15,000	Interest	$1 - $200	☐
Vanguard Consumer Dsc ETC (VCR) [MF]	JT	$50,001 - $100,000	Dividends	$201 - $1,000	☐
Vanguard Financials ETF (VFH) [MF]	JT	$50,001 - $100,000	Dividends	$1,001 - $2,500	☐

* 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?
529 FBO Minor 1 ⇒ 529 WI Voya 529 Age 0-4 Option Class A (VWVAX) [MF]		04/17/2023	P	$1,001 - $15,000	
529 FBO Minor 2 ⇒		04/1/2024	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
529 WI Voya 529 Age 0-4 Option Class A (VWVAX) [MF]					
529 FBO Minor 2 ⇒ 529 WI Voya 529 Age 0-4 Option Class A (VWVAX) [MF]		03/8/2023	P	$1,001 - $15,000	
ClearBridge Large Cap Growth Fd Class I (SBLYX) [MF]	JT	01/17/2023	P	$100,001 - $250,000	
Delaware Ivy Science and Technology Fund Class I (ISTIX) [MF]	JT	01/11/2024	P	$15,001 - $50,000	
Delaware Ivy Science and Technology Fund Class I (ISTIX) [MF]	JT	12/11/2023	S (partial)	$15,001 - $50,000	☐
Delaware Ivy Science and Technology Fund Class I (ISTIX) [MF]	JT	02/12/2024	S (partial)	$1,001 - $15,000	☐
Invesco Equally-Weighted S&P Fund Class Y (VADDX) [MF]	JT	01/30/2023	P	$15,001 - $50,000	
Invesco Equally-Weighted S&P Fund Class Y (VADDX) [MF]	JT	12/18/2023	P	$1,001 - $15,000	
iShares Russell 1000 Growth ETF (IWF) [EF]		01/17/2023	S	$100,001 - $250,000	☐
iShares Russell 1000 Value ETF (IWD) [EF]		01/18/2023	S (partial)	$1,001 - $15,000	☐
iShares Russell 1000 Value ETF (IWD) [EF]		01/30/2023	S	$15,001 - $50,000	☑
MFS Value Fund - Class I (MEIIX) [MF]	JT	12/15/2023	P	$15,001 - $50,000	
MFS Value Fund - Class I (MEIIX) [MF]	JT	12/19/2023	P	$1,001 - $15,000	
Morgan Stanley IRA - SP ⇒ Franklin Income Fund Advisor Class (FRIAX) [MF]	SP	01/4/2023	S	$1,001 - $15,000	☐
Morgan Stanley IRA - SP ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	09/22/2023	S (partial)	$1,001 - $15,000	☐
Morgan Stanley IRA - SP ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	04/19/2024	S (partial)	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Morgan Stanley IRA - SP ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]	SP	09/22/2023	S (partial)	$1,001 - $15,000	☐
Morgan Stanley IRA - SP ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	09/22/2023	P	$1,001 - $15,000	
Morgan Stanley IRA - SP ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	09/22/2023	P	$1,001 - $15,000	
Morgan Stanley IRA - SP ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	04/19/2024	P	$1,001 - $15,000	
Morgan Stanley IRA - SP ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	04/5/2024	S (partial)	$1,001 - $15,000	☐
Morgan Stanley IRA - SP ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	06/9/2023	S (partial)	$1,001 - $15,000	☐
Morgan Stanley IRA - SP ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	04/5/2024	P	$1,001 - $15,000	
Morgan Stanley IRA - SP ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	04/19/2024	P	$1,001 - $15,000	
Morgan Stanley IRA - SP ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	09/22/2023	S (partial)	$1,001 - $15,000	☐
Morgan Stanley IRA - SP ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	06/9/2023	P	$1,001 - $15,000	
Morgan Stanley IRA - SP ⇒ iShares Russell 2000 Growth ETF (IWO) [EF]	SP	04/19/2024	S	$1,001 - $15,000	☐
Morgan Stanley IRA - SP ⇒ iShares Russell 2000 Value ETF (IWN) [EF]	SP	04/19/2024	S	$1,001 - $15,000	☐
Roth IRA ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]		01/4/2023	P	$1,001 - $15,000	
SPDR Select Sector Fund - Technology (XLK) [EF]	JT	01/11/2024	S	$15,001 - $50,000	☐
SPDR Select Sector Fund - Technology (XLK) [EF]	JT	12/19/2023	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
SPDR Select Sector Fund - Technology (XLK) [EF]	JT	12/15/2023	P	$1,001 - $15,000	
SPDR Select Sector Fund - Technology (XLK) [EF]	JT	12/11/2023	P	$15,001 - $50,000	

* 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
Force Residuals CA Inc.	Performance Residuals - Spouse	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Nicolet National Bank	July 2019	Mortgage on Primary Residence	$100,001 - $250,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
April 2024	Palantir Technologies Inc., Filer	Agreement with Palantir Technologies Inc. for future employment as Head of Defense, start date 6/1/2024.

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

- 529 FBO Minor 1
  LOCATION: WI
- 529 FBO Minor 2
  LOCATION: WI
- John Hancock 401k (Owner: SP)
- Morgan Stanley IRA - SP (Owner: SP)
- Roth 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. Michael John Gallagher , 08/22/2024