Filing ID #10060670

Financial Disclosure Report

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Filer Information

Name: Jill Andrea Lochner
Status: Congressional Candidate
State/District: NY21

Filing Information

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/12/2024
Period Covered: 01/01/2023– 04/15/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chase ⇒ iShares 0-3 Month Treasury Bond ETF (SGOV) [EF]		$15,001 - $50,000	Capital Gains	$201 - $1,000	$201 - $1,000
Chase ⇒ Personal Checking Account [BA]		$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Chase ⇒ Personal Savings Account [BA]		$1 - $1,000	Interest	$1 - $200	$1 - $200
Chase ⇒ Personal Savings Account [BA]		$1,001 - $15,000	Interest	$1 - $200	$1 - $200
Chase ⇒ Savings Account [BA]		$1 - $1,000	Interest	$1 - $200	$1 - $200
Cryptocurrency ⇒ BTC [OT] Description: Cryptocurrency		$1,001 - $15,000	Capital Gains	None	None
Cryptocurrency ⇒ ETH [OT]		$1,001 - $15,000	Capital Gains	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Cryptocurrency					
Cryptocurrency ⇒ XRP [OT] DESCRIPTION: Cryptocurrency		$1 - $1,000	Capital Gains	None	None
Fidelity 401k ⇒ Fidelity Blue Chip Growth K6 Fund (FBCGX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity 401k ⇒ FJTKX [MF]	SP	$50,001 - $100,000	Tax-Deferred		
Fidelity 401k ⇒ FSMAX [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Fidelity 401k ⇒ FSPSX [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Fidelity 401k ⇒ FXAIX [MF]	SP	$100,001 - $250,000	Tax-Deferred		
Fidelity Brokerage ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]	SP	$1,001 - $15,000	Capital Gains	$1 - $200	$1 - $200
Fidelity Brokerage ⇒ iShares 0-3 Month Treasury Bond ETF (SGOV) [EF]	SP	$1 - $1,000	Capital Gains	$1 - $200	$1 - $200
Fidelity Brokerage ⇒ iShares 0-3 Month Treasury Bond ETF (SGOV) [EF]	SP	$100,001 - $250,000	Capital Gains	$2,501 - $5,000	$2,501 - $5,000
Fidelity Cash Account ⇒ QUSBQ [MF]	SP	$1 - $1,000	Interest	$1 - $200	$1 - $200
Fidelity IRA ⇒ FDRXX [MF]	SP	$250,001 - $500,000	Tax-Deferred		
Fidelity IRA ⇒ Fidelity MSCI Energy Index ETF (FENY) [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Fidelity IRA ⇒	SP	$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
KeyCorp (KEY) [ST]					
Fidelity IRA ⇒ QPCBQ [BA]		$50,001 - $100,000	Tax-Deferred		
Fidelity IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]		$50,001 - $100,000	None		
Fidelity IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Fidelity Joint Brokerage ⇒ FCASH [OT] Description: Cash holdings	JT	$1 - $1,000	Interest	$1 - $200	$1 - $200
Fidelity UTMA ⇒ FCASH [OT] Description: Cash holdings	DC	$1,001 - $15,000	None		
Fidelity UTMA ⇒ Fidelity Government Money Market Fund (SPAXX) [MF]		$1 - $1,000	Capital Gains	$1 - $200	$1 - $200
Fidelity UTMA ⇒ IEMG [MF]	DC	$1 - $1,000	Capital Gains	$1 - $200	$1 - $200
Fidelity UTMA ⇒ IEMG [MF]	DC	$1 - $1,000	Capital Gains	$1 - $200	$1 - $200
Fidelity UTMA ⇒ IEMG [MF]	DC	$1 - $1,000	Capital Gains	$1 - $200	$1 - $200
Fidelity UTMA ⇒ IEMG [EF]	DC	$1 - $1,000	Capital Gains	$1 - $200	$1 - $200
Fidelity UTMA ⇒ SPAXX [MF]		$1 - $1,000	Capital Gains	$1 - $200	$1 - $200
Fidelity UTMA ⇒ SPAXX [MF]		$1 - $1,000	Capital Gains	$1 - $200	$1 - $200
Fidelity UTMA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	DC	$1,001 - $15,000	Capital Gains	$1 - $200	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity UTMA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	DC	$1,001 - $15,000	Capital Gains	$1 - $200	$1 - $200
Fidelity UTMA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	DC	$1,001 - $15,000	Capital Gains	$1 - $200	$1 - $200
Fidelity UTMA ⇒ Vanguard S&P 500 ETF (VOO) [EF]	DC	$1,001 - $15,000	Capital Gains	$1 - $200	$1 - $200
Key Bank ⇒ Business Checking [BA]		$1 - $1,000	Interest	$1 - $200	$1 - $200
Key Bank ⇒ Personal Checking Account [BA]		$1 - $1,000	Interest	$1 - $200	$1 - $200
Rental Property [RP] Location: Rochester, NY, US		$100,001 - $250,000	Rent	$15,001 - $50,000	$15,001 - $50,000
Toro Company (TTC) [ST]		$1,001 - $15,000	Capital Gains	$2,501 - $5,000	None
Trustco Bank ⇒ Personal Checking Account [BA]		$1,001 - $15,000	Interest	$1 - $200	$1 - $200

* 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 Current Year to Filing	Amount Preceding Year
Coordinates Operations, LLC	Spouse Salary	N/A	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Newrez LLC	Sep 2003	Mortgage	$10,000 - $15,000
	Nelnet Loan Servicing	May 2006	Student loan	$15,001 - $50,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

None disclosed.

Schedule A Investment Vehicle Details

- Chase
  Location: US
- Cryptocurrency
  Location: US
- Fidelity 401k (Owner: SP)
- Fidelity Brokerage (Owner: SP)
  Location: US
- Fidelity Cash Account (Owner: SP)
  Location: US
- Fidelity IRA
- Fidelity IRA (Owner: SP)
- Fidelity Joint Brokerage (Owner: JT)
  Location: US
- Fidelity UTMA (Owner: DC)
  Location: NY, US
- Fidelity UTMA (Owner: DC)
  Location: NY, US
- Fidelity UTMA (Owner: DC)
  Location: NY, US
- Fidelity UTMA (Owner: DC)
  Location: NY, US
- Fidelity UTMA
  Location: US
- Fidelity UTMA
  Location: US
- Key Bank
  Location: US
- Trustco Bank
  Location: US

Exclusions of Spouse, Dependent, or Trust Information

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: Jill Andrea Lochner , 05/12/2024