Filing ID #10063287

Financial Disclosure Report

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Filer Information

Name: Hon. Matt Cartwright
Status: Former Member
State/District: PA08

Filing Information

Filing Type: Terminated Filer Report
Filing Year: 2025
Filing Date: 05/01/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
"Litigating Business and Commercial Tort Cases" published by Thomson Reuters [IP]		Undetermined	Royalties	$1,001 - $2,500	
B.O.B. Digital Marketing Agency, LLC [OL] Location: Scranton, PA, US Description: New asset acquired in 2021, and filer is voluntarily reporting it. The value is below $1000 and there were no reportable transactions.	SP	$1 - $1,000	None		
Blackrock Mid Cap Growth A [MF]	JT	$50,001 - $100,000	Dividends	None	
Columbia Acorn International Fund [MF]		$250,001 - $500,000	Dividends	None	
Elfun Trusts Funds [MF]		$250,001 - $500,000	Capital Gains, Interest	$50,001 - $100,000	
Hague NY Property Trust [RP] Location: Hague, NY, US		$250,001 - $500,000	Rent	$5,001 - $15,000	
Merrill Edge Cash/Money Account [BA]		$15,001 - $50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Met Life Whole Life Policy [WU]		$15,001 - $50,000	Dividends, Interest	$201 - $1,000	☐
Munley Financing [OL] LOCATION: Scranton, PA, US DESCRIPTION: Ownership interest	SP	$100,001 - $250,000	Interest	$2,501 - $5,000	☐
Munley Law PC [OL] LOCATION: Scranton, PA, US DESCRIPTION: Ownership interest	SP	$100,001 - $250,000	None		☐
Nantucket Holding Company [RP] LOCATION: Scranton, PA, US DESCRIPTION: Holding company for 231 and 241 Penn Ave	JT	$50,001 - $100,000	Rent	$15,001 - $50,000	☐
Penn Avenue Properties [RP] LOCATION: Scranton, PA, US	SP	$100,001 - $250,000	None		☐
People's Security Bank Accounts [BA]		$100,001 - $250,000	Interest	$1 - $200	☐
PNC Bank Accounts [BA]		$50,001 - $100,000	None		☐
Wayne Bank Accounts [BA]		$1,001 - $15,000	Interest	$1 - $200	☐
Archer Partners LLC ⇒ People's Security Checking Account [BA]		$1 - $1,000	None		☐
Archer Partners LLC ⇒ Piper Archer III Single Prop aircraft [OL] LOCATION: Scranton, PA, US DESCRIPTION: Asset of Archer Partners LLC		$100,001 - $250,000	None		☐
Charles Schwab Investment Account ⇒ Amplify ETF Trust Amplify Mobile Payments ETF (IPAY) [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	☐
Charles Schwab Investment Account ⇒ Bank Sweep account [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Charles Schwab Investment Account ⇒ First Trust Dorsey Wright International Focus 5 ETF (IFV) [EF]	JT	None	Capital Gains, Dividends	$201 - $1,000	✓
Charles Schwab Investment Account ⇒ First Trust RBA American Industrial Renaissance ETF (AIRR) [EF]	JT	None	Capital Gains, Dividends	$201 - $1,000	✓
Charles Schwab Investment Account ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	
Charles Schwab Investment Account ⇒ Global X Uranium ETF (URA) [EF]	JT	$15,001 - $50,000	Dividends	$1,001 - $2,500	
Charles Schwab Investment Account ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	✓
Charles Schwab Investment Account ⇒ Invesco Leisure and Entertainment ETF (PEJ) [EF]	JT	None	Capital Gains, Dividends	$1,001 - $2,500	✓
Charles Schwab Investment Account ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	✓
Charles Schwab Investment Account ⇒ Invesco S&P 500 Equal Weight Consumer Discretionary ETF (RSPD) [EF]	JT	$1,001 - $15,000	Dividends	$1 - $200	
Charles Schwab Investment Account ⇒ Invesco S&P 500 Equal Weight Technology ETF (RSPT) [EF]	JT	None	Capital Gains, Dividends	$1,001 - $2,500	✓
Charles Schwab Investment Account ⇒ Invesco S&P SmallCap Financials ETF (PSCF) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	✓
Charles Schwab Investment Account ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	✓
Charles Schwab Investment Account ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	✓
Charles Schwab Investment Account ⇒ iShares Cybersecurity and Tech ETF (IHAK) [EF]	JT	$1,001 - $15,000	Dividends	$1 - $200	✓
Charles Schwab Investment Account ⇒	JT	$50,001 -	Dividends	$1 - $200	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
iShares Russell 2000 ETF (IWM) [EF]		$100,000			
Charles Schwab Investment Account ⇒ JP Morgan Chase CD [BA]	JT	$50,001 - $100,000	None		✓
Charles Schwab Investment Account ⇒ Materials Select Sector SPDR (XLB) [EF]	JT	None	Capital Gains, Dividends	$201 - $1,000	✓
Charles Schwab Investment Account ⇒ Schwab Treasury Obligations Money Fund - Investor Shares (SNOXX) [MF]	JT	$100,001 - $250,000	Dividends	None	✓
Charles Schwab Investment Account ⇒ SPDR Gold Trust (GLD) [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	
Charles Schwab Investment Account ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]	JT	None	Dividends	$201 - $1,000	✓
Charles Schwab Investment Account ⇒ SPDR S&P Retail ETF (XRT) [EF]	JT	None	Capital Gains, Dividends	$1,001 - $2,500	✓
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	✓
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	JT	None	Capital Gains, Dividends	$2,501 - $5,000	✓
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	JT	$1,001 - $15,000	Dividends	$1 - $200	
Charles Schwab Investment Account ⇒ VanEck Gold Miners ETF (GDX) [EF]	JT	None	Capital Gains, Dividends	$1,001 - $2,500	✓
Charles Schwab Investment Account ⇒ VanEck Semiconductor ETF (SMH) [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	✓
Charles Schwab Investment Account ⇒	JT	None	Capital Gains,	$1,001 -	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Vanguard Total Stock Market ETF (VTI) [EF]			Dividends	$2,500	
Munley Law Profit Sharing Plan ⇒ IShares 0-5 Year High Yield Corp Bond [EF]		$50,001 - $100,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares 0-5 Year High Yield Corp Bond [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares 1-3 Treasury Bond [EF]	SP	$100,001 - $250,000	Tax-Deferred		☐
Munley Law Profit Sharing Plan ⇒ IShares 1-3 Treasury Bond [EF]		$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond [EF]		$50,001 - $100,000	Tax-Deferred		☐
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond [EF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares 3-7 Year Treasury Bond [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares 3-7 Year Treasury Bond [EF]		$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares 7-10 Year Treasury Bond [EF]		$50,001 - $100,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Broad USD Invt Grade [EF]		$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Broad USD Invt Grade [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI EAFE [EF]	SP	$100,001 - $250,000	Tax-Deferred		☐
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI EAFE [EF]		$15,001 - $50,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI Emerging Markets [EF]		$1,001 - $15,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI Emerging Markets [EF]	SP	$50,001 - $100,000	Tax-Deferred		☐
Munley Law Profit Sharing Plan ⇒ IShares IBOXX Invt Grade Corp Bond [EF]		$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares IBOXX Invt Grade Corp Bond [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares JPM USD Emerging Markets Bond [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares JPM USD Emerging Markets Bond [EF]		$50,001 - $100,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Growth [EF]		$15,001 - $50,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Growth [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Value [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Value [EF]		$15,001 - $50,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Russell 2000 [EF]		$1,001 - $15,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Russell 2000 [EF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Russell MidCap [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Russell MidCap [EF]		$15,001 - $50,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ Liquid Assets Govt Fund [EF]		$1,001 - $15,000	Tax-Deferred		☐
Munley Law Profit Sharing Plan ⇒ Liquid Assets Govt Fund [EF]	SP	$15,001 - $50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corp Bond [EF]	SP	$100,001 - $250,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corp Bond [EF]		$100,001 - $250,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]		$50,001 - $100,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ US Treasury Note 2/15/2023 [EF]		$15,001 - $50,000	Tax-Deferred		
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]		$15,001 - $50,000	Tax-Deferred		
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]	SP	$100,001 - $250,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]		$1,001 - $15,000	Tax-Deferred		
RBC Investment Account ⇒ AB Bond Funds - AB Short Duration High Yield Portfolio - Advisor Class (ALHYX) [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	$15,001 - $50,000	Dividends	$1,001 - $2,500	✓
RBC Investment Account ⇒ AB Large-Cap Growth Adv [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	$15,001 - $50,000	Capital Gains, Dividends	$201 - $1,000	
RBC Investment Account ⇒ AB Select US Long/Short [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	$15,001 - $50,000	Capital Gains, Dividends	$201 - $1,000	
RBC Investment Account ⇒ Abbey Capital Multi Asset Fund - Class I (MAFIX) [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
RBC Investment Account ⇒ Allspring Money Market Fund - Premier Class (WMPXX) [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Dividends	$1,001 - $2,500	☑
RBC Investment Account ⇒ American Balanced F2 [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Dividends	None	☑
RBC Investment Account ⇒ BNY Mellon Global Fixed Income Fund Class I (SDGIX) [MF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	☑
RBC Investment Account ⇒ Calamos Phineus Long/Short I [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Dividends	None	☑
RBC Investment Account ⇒ Capital Group Core Balanced ETF (CGBL) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	☑
RBC Investment Account ⇒ Capital Group Dividend Growers ETF (CGDG) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	☑
RBC Investment Account ⇒ Catalyst Millburn HGD Strat I [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	$1,001 - $15,000	Dividends	$201 - $1,000	☑
RBC Investment Account ⇒ ClearBridge International Growth Fund Class I (LMGNX) [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Dividends	$1 - $200	☑
RBC Investment Account ⇒ Columbia Balanced Inst [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	$15,001 - $50,000	Dividends	$201 - $1,000	☑
RBC Investment Account ⇒ Columbia Strategic Income Fund Class I (LSIZX) [MF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	☑
RBC Investment Account ⇒ ETG - Eaton Vance Tax Advantage Global Dividend [OT] DESCRIPTION: ETF; not in database Asset transferred from Morgan Stanley to RBC.	JT	None	Dividends	$201 - $1,000	☑
RBC Investment Account ⇒	JT	$15,001 - $50,000	Dividends	$201 -	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity Advisor Emerging Markets Fund: Class I (FIMKX) [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.				$1,000	
RBC Investment Account ⇒ Fidelity Advisor Real Estate Income Fund: Class I (FRIRX) [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Dividends	$201 - $1,000	✓
RBC Investment Account ⇒ Fidelity Advisor Small Cap Fund: Class I (FSCIX) [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	$1,001 - $15,000	Dividends	$1 - $200	
RBC Investment Account ⇒ Fidelity Advisor Total Bond Fund: Class I (FEPIX) [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Dividends	$201 - $1,000	✓
RBC Investment Account ⇒ Fidelity Total Bond ETF (FBND) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	✓
RBC Investment Account ⇒ First Eagle Global [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	$15,001 - $50,000	Dividends	$201 - $1,000	✓
RBC Investment Account ⇒ Gabelli Utilities I [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Capital Gains, Dividends	$201 - $1,000	✓
RBC Investment Account ⇒ Gateway Fund Y [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	$15,001 - $50,000	Capital Gains, Dividends	$1 - $200	✓
RBC Investment Account ⇒ Guggenheim Floating Rt Straight I [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Dividends	None	✓
RBC Investment Account ⇒ Guggenheim Total Return Bond Fund- Institutional Class (GIBIX) [MF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	✓
RBC Investment Account ⇒ Hartford Balanced Inc [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Dividends	None	✓
RBC Investment Account ⇒	JT	$1,001 - $15,000	Dividends	$1 - $200	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Hartford Schr US Mdcp Opp I [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.					
RBC Investment Account ⇒ Ishares Core S&P Small Cap E [EF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	$1,001 - $15,000	Dividends	$201 - $1,000	
RBC Investment Account ⇒ Janus Henderson Balanced [MF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Dividends	$201 - $1,000	✓
RBC Investment Account ⇒ JPMorgan Equity Premium INCO [EF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Dividends	None	✓
RBC Investment Account ⇒ RBC Cash [BA]	JT	$15,001 - $50,000	Interest	$1 - $200	
RBC Investment Account ⇒ Thornburg Investment Income Builder Fund Class I (TIBIX) [MF]	JT	$15,001 - $50,000	Dividends	$1,001 - $2,500	✓
RBC Investment Account ⇒ VanEck Morningstar Wide Moat ETF (MOAT) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	✓
RBC Investment Account ⇒ Vanguard Health Care ETF [EF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	None	Capital Gains, Dividends	$201 - $1,000	✓
RBC Investment Account ⇒ Vanguard Mid-Cap ETF (VO) [EF] DESCRIPTION: Asset transferred from Morgan Stanley to RBC.	JT	$1,001 - $15,000	Dividends	$1 - $200	
TD Ameritrade Account ⇒ Bristol-Myers Squibb Company (BMY) [ST]	JT	$1,001 - $15,000	Dividends	$1 - $200	
TD Ameritrade Account ⇒ General Electric Company (GE) [ST]	JT	$1,001 - $15,000	Dividends	$1 - $200	
TD Ameritrade Account ⇒ TD Ameritrade Sweep Account [BA]	JT	$1,001 - $15,000	Interest	None	
TD Ameritrade Account ⇒ Westinghouse Air Brake Technologies Corporation (WAB) [ST]	JT	$1 - $1,000	Dividends	$1 - $200	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
UBS Investment Account ⇒ Bank Hapoalim BM NY US [BA]	JT	$100,001 - $250,000	Interest	$2,501 - $5,000	☑
UBS Investment Account ⇒ Ishares Core MSCI EAFE [MF]	JT	$15,001 - $50,000	Capital Gains, Dividends	$1,001 - $2,500	☐
UBS Investment Account ⇒ iShares Semiconductor ETF (SOXX) [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	☑
UBS Investment Account ⇒ Pimco Enhanced Short Maturation [MF]	JT	$15,001 - $50,000	Dividends	$1,001 - $2,500	☐
UBS Investment Account ⇒ UBS Prime Reserves Fund [BA]	JT	$1,001 - $15,000	Dividends	$1,001 - $2,500	☑
UBS Investment Account ⇒ UBS Sweep Account [BA]	JT	$1,001 - $15,000	None		☐
UBS Investment Account ⇒ Vanguard Short Term Corporate Bond [MF]	JT	$15,001 - $50,000	Capital Gains, Dividends	$1,001 - $2,500	☐
UBS Investment Account ⇒ Vanguard Total Stock Market [MF]	JT	$50,001 - $100,000	Dividends	$201 - $1,000	☐
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	None	Dividends	$5,001 - $15,000	☑
Vanguard Investment Account ⇒ Cash Reserve Federal Money Market Fund [MF]	JT	$1,001 - $15,000	Dividends	$2,501 - $5,000	☑
Vanguard Investment Account ⇒ Emerging Markets Stock Index [MF]	JT	None	Dividends	$5,001 - $15,000	☑
Vanguard Investment Account ⇒ Real Estate Index [MF]	JT	$15,001 - $50,000	Dividends	$2,501 - $5,000	☑
Vanguard Investment Account ⇒ Treasury Money Market [MF]	JT	None	Dividends	$2,501 - $5,000	☑
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	$250,001 - $500,000	Dividends	$15,001 - $50,000	☑
Vanguard Investment Account ⇒	JT	$100,001 -	Capital Gains,	$5,001 -	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Wellesley Income Fund [MF]		$250,000	Dividends	$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 B: Transactions

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Charles Schwab Investment Account ⇒ Schwab Treasury Obligations Money Fund - Investor Shares (SNOXX) [MF]	JT	04/02/2024	P	$50,001 - $100,000	
Charles Schwab Investment Account ⇒ JP Morgan Chase CD [BA]	JT	04/02/2024	P	$15,001 - $50,000	
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]	SP	10/17/2024	P	$15,001 - $50,000	
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corporate Bond ETF (SPSB) [EF]	SP	10/16/2024	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares iBoxx $ Investment Grade Corporate Bond ETF (LQD) [EF]	SP	10/16/2024	P	$15,001 - $50,000	
Munley Law Profit Sharing Plan ⇒ iShares iBoxx $ Investment Grade Corporate Bond ETF (LQD) [EF]	SP	10/16/2024	P	$15,001 - $50,000	
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	SP	10/16/2024	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [EF]	SP	10/16/2024	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF]	SP	10/16/2024	P	$15,001 - $50,000	
Munley Law Profit Sharing Plan ⇒ ishares JP Morgan USD Emerging Markets Bond [CS] Description: Fund not available for selection in system.	SP	10/16/2024	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corporate Bond ETF (SHYG) [EF]	SP	10/16/2024	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]	SP	10/16/2024	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]	SP	10/16/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 ETF (IWM) [EF]	SP	10/16/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value ETF (IWD) [EF]	SP	10/16/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]	SP	10/16/2024	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]	SP	07/29/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]	SP	07/15/2024	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]		12/09/2024	P	$15,001 - $50,000	
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corporate Bond ETF (SHYG) [EF]		12/06/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 ETF (IWM) [EF]		12/06/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value ETF (IWD) [EF]		12/06/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]		12/06/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒		12/06/2024	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
iShares 7-10 Year Treasury Bond ETF (IEF) [EF]			(partial)		☐
Munley Law Profit Sharing Plan ⇒ iShares iBoxx $ Investment Grade Corporate Bond ETF (LQD) [EF]		12/06/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Year Treasury Bond ETF (SHY) [EF]		12/06/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ IShares JP Morgan USD Emerging Markets Bond [CS] DESCRIPTION: Fund not available for selection in system.		12/06/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]		12/06/2024	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ UBS Government Money Market Investments Class P (PCEXX) [MF]		12/04/2024	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corporate Bond ETF (SPSB) [EF]		10/16/2024	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [EF]		10/16/2024	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares iBoxx $ Investment Grade Corporate Bond ETF (LQD) [EF]		10/16/2024	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [EF]		10/16/2024	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [EF]		10/16/2024	P	$15,001 - $50,000	
Munley Law Profit Sharing Plan ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		10/16/2024	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corporate Bond ETF (SHYG) [EF]		10/16/2024	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒		10/16/2024	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
iShares Russell 2000 ETF (IWM) [EF]			(partial)		
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Value ETF (IWD) [EF]		10/16/2024	S (partial)	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]		10/16/2024	S (partial)	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]		10/16/2024	S (partial)	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		10/16/2024	S (partial)	$1,001 - $15,000	
Vanguard Investment Account ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	JT	12/16/2024	S	$500,001 - $1,000,000	
Vanguard Investment Account ⇒ Vanguard Cash Reserves Federal Money Market Fund Admiral Shares (VMRXX) [MF]	JT	12/16/2024	P	$1,000,001 - $5,000,000	
Vanguard Investment Account ⇒ Vanguard Cash Reserves Federal Money Market Fund Admiral Shares (VMRXX) [MF]	JT	12/26/2024	P	$250,001 - $500,000	
Vanguard Investment Account ⇒ Vanguard Cash Reserves Federal Money Market Fund Admiral Shares (VMRXX) [MF]	JT	12/26/2024	S (partial)	$1,000,001 - $5,000,000	
Vanguard Investment Account ⇒ Vanguard Emerging Markets Stock Index Fund Admiral Shares (VEMAX) [MF]	JT	12/26/2024	S	$100,001 - $250,000	
Vanguard Investment Account ⇒ Vanguard Real Estate Index Fund Admiral Shares (VGSLX) [MF]	JT	12/16/2024	S (partial)	$15,001 - $50,000	
Vanguard Investment Account ⇒ Vanguard Treasury Money Market Fund (VUSXX) [MF]	JT	11/19/2024	S (partial)	$100,001 - $250,000	
Vanguard Investment Account ⇒ Vanguard Treasury Money Market Fund (VUSXX) [MF]	JT	12/26/2024	S	$15,001 - $50,000	
Vanguard Investment Account ⇒	JT	12/16/2024	S	$500,001 -	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Vanguard Growth Index Fd Admiral Shs (VIGAX) [MF]			(partial)	$1,000,000	
Vanguard Investment Account ⇒ Vanguard Wellesley Income Fund Admiral Shares (VWIAX) [MF]	JT	12/18/2024	P	$1,001 - $15,000	
RBC Investment Account ⇒ AB Bond Funds - AB Short Duration High Yield Portfolio - Advisor Class (ALHYX) [MF]	JT	10/02/2024	P	$1,001 - $15,000	
RBC Investment Account ⇒ Allspring Money Market Fund - Premier Class (WMPXX) [MF]	JT	05/28/2024	S	$15,001 - $50,000	☐
RBC Investment Account ⇒ American Balanced Fund Class F-2 Shs (AMBFX) [MF]	JT	05/28/2024	S	$15,001 - $50,000	☐
RBC Investment Account ⇒ Abbey Capital Multi Asset Fund - Class I (MAFIX) [MF]	JT	10/02/2024	P	$1,001 - $15,000	
RBC Investment Account ⇒ BNY Mellon Global Fixed Income Fund Class I (SDGIX) [MF]	JT	10/02/2024	P	$15,001 - $50,000	
RBC Investment Account ⇒ Calamos Phineus Long Short Fund Class I (CPLIX) [MF]	JT	10/02/2024	S	$1,001 - $15,000	☐
RBC Investment Account ⇒ Catalyst/Millburn Dynamic Commodity Strategy Fund Class I (DCXIX) [MF]	JT	10/02/2024	S (partial)	$1,001 - $15,000	☐
RBC Investment Account ⇒ ClearBridge International Growth Fund Class I (LMGNX) [MF]	JT	05/28/2024	S	$15,001 - $50,000	☐
RBC Investment Account ⇒ Columbia Balanced Fund Class I (CBALX) [MF]	JT	10/02/2024	S (partial)	$1,001 - $15,000	☐
RBC Investment Account ⇒ Capital Group Dividend Growers ETF (CGDG) [EF]	JT	10/02/2024	P	$15,001 - $50,000	
RBC Investment Account ⇒ Columbia Strategic Income Fund Class I (LSIZX) [MF]	JT	10/02/2024	P	$1,001 - $15,000	
RBC Investment Account ⇒	JT	05/28/2024	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
ETG - Eaton Vance Tax Advantage Global Dividend [OT] LOCATION: US DESCRIPTION: ETF: not in database.					
RBC Investment Account ⇒ Fidelity Advisor Real Estate Income Fund: Class I (FRIRX) [MF]	JT	05/28/2024	S	$15,001 - $50,000	☐
RBC Investment Account ⇒ Fidelity Advisor Total Bond Fund: Class I (FEPIX) [MF]	JT	10/02/2024	S	$1,001 - $15,000	☐
RBC Investment Account ⇒ First Eagle Global Fund Class I (SGIIX) [MF]	JT	10/02/2024	S (partial)	$1,001 - $15,000	☐
RBC Investment Account ⇒ Fidelity Total Bond ETF (FBND) [EF]	JT	10/02/2024	P	$15,001 - $50,000	
RBC Investment Account ⇒ Fidelity Total Bond ETF (FBND) [EF]	JT	10/02/2024	P	$15,001 - $50,000	
RBC Investment Account ⇒ The Gabelli Utilities Fd Cl I (GAUIX) [MF]	JT	05/28/2024	S	$15,001 - $50,000	☑
RBC Investment Account ⇒ Gateway Fund Class Y (GTEYX) [MF]	JT	10/02/2024	S (partial)	$1,001 - $15,000	☐
RBC Investment Account ⇒ Capital Group Core Balanced ETF (CGBL) [EF]	JT	05/28/2024	P	$15,001 - $50,000	
RBC Investment Account ⇒ Guggenheim Floating Rate Strategies Fund- Institutional Class (GIFIX) [MF]	JT	05/28/2024	S	$15,001 - $50,000	☐
RBC Investment Account ⇒ Guggenheim Total Return Bond Fund- Institutional Class (GIBIX) [MF]	JT	10/02/2024	P	$15,001 - $50,000	
RBC Investment Account ⇒ Hartford Balanced Income Fund Class I (HBLIX) [MF]	JT	05/28/2024	S	$15,001 - $50,000	☐
UBS Investment Account ⇒ iShares Semiconductor ETF (SOXX) [EF]	JT	05/07/2024	P	$15,001 - $50,000	
UBS Investment Account ⇒	JT	03/15/2024	S	$50,001 -	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
UBS Prime Reserves Fund [BA]			(partial)	$100,000	
UBS Investment Account ⇒ Bank Hapoalim BM NY US [BA]	JT	03/20/2024	P	$100,001 - $250,000	
Charles Schwab Investment Account ⇒ VanEck Semiconductor ETF (SMH) [EF]	JT	05/07/2024	P	$15,001 - $50,000	
Charles Schwab Investment Account ⇒ VanEck Semiconductor ETF (SMH) [EF]	JT	07/25/2024	P	$1,001 - $15,000	
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	JT	01/15/2024	P	$1,001 - $15,000	
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	JT	03/05/2024	P	$1,001 - $15,000	
Charles Schwab Investment Account ⇒ iShares Cybersecurity and Tech ETF (IHAK) [EF]	JT	01/12/2024	P	$1,001 - $15,000	
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	JT	01/12/2024	P	$1,001 - $15,000	
Charles Schwab Investment Account ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	JT	11/07/2024	P	$15,001 - $50,000	
Charles Schwab Investment Account ⇒ Invesco S&P SmallCap Financials ETF (PSCF) [EF]	JT	07/19/2024	P	$1,001 - $15,000	
Charles Schwab Investment Account ⇒ Invesco S&P SmallCap Financials ETF (PSCF) [EF]	JT	07/25/2024	P	$1,001 - $15,000	
Charles Schwab Investment Account ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]	JT	03/22/2024	P	$15,001 - $50,000	
Charles Schwab Investment Account ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]	JT	05/07/2024	P	$15,001 - $50,000	
Charles Schwab Investment Account ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	JT	12/23/2024	P	$15,001 - $50,000	
Charles Schwab Investment Account ⇒ First Trust Dorsey Wright International Focus 5 ETF (IFV)	JT	05/07/2024	S	$15,001 - $50,000	✓

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
[EF]					
Charles Schwab Investment Account ⇒ First Trust RBA American Industrial Renaissance ETF (AIRR) [EF]	JT	01/12/2024	S	$15,001 - $50,000	☑
Charles Schwab Investment Account ⇒ Invesco Leisure and Entertainment ETF (PEJ) [EF]	JT	05/07/2024	S	$1,001 - $15,000	☑
Charles Schwab Investment Account ⇒ Invesco S&P 500 Equal Weight Technology ETF (RSPT) [EF]	JT	01/12/2024	S	$1,001 - $15,000	☑
Charles Schwab Investment Account ⇒ iShares Russell 2000 ETF (IWM) [EF]	JT	04/04/2024	P	$15,001 - $50,000	
Charles Schwab Investment Account ⇒ Materials Select Sector SPDR (XLB) [EF]	JT	01/12/2024	S	$15,001 - $50,000	☑
Charles Schwab Investment Account ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]	JT	02/08/2024	S	$1,001 - $15,000	☐
Charles Schwab Investment Account ⇒ SPDR S&P Retail ETF (XRT) [EF]	JT	01/12/2024	S	$15,001 - $50,000	☑
Charles Schwab Investment Account ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	JT	02/08/2024	S	$15,001 - $50,000	☑
Charles Schwab Investment Account ⇒ VanEck Gold Miners ETF (GDX) [EF]	JT	11/07/2024	S	$15,001 - $50,000	☑
Charles Schwab Investment Account ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	JT	02/08/2024	S	$15,001 - $50,000	☑
RBC Investment Account ⇒ Janus Henderson Balanced Fund - A Shares (JDBAX) [MF]	JT	05/28/2024	S	$15,001 - $50,000	☐
RBC Investment Account ⇒ JPMorgan Equity Premium Income Fund Class I (JEPIX) [MF]	JT	05/28/2024	S	$15,001 - $50,000	☐
RBC Investment Account ⇒ VanEck Morningstar Wide Moat ETF (MOAT) [EF]	JT	05/28/2024	P	$15,001 - $50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
RBC Investment Account ⇒ Vanguard Health Care ETF (VHT) [EF]	JT	05/28/2024	S	$1,001 - $15,000	✓
RBC Investment Account ⇒ Thornburg Investment Income Builder Fund Class I (TIBIX) [MF]	JT	05/28/2024	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
Munley Law	Spouse Salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	People's Security Bank	2023 periodic	Law firm lines of credit	$1,000,001 - $5,000,000
JT	People's Security Bank	March 2008	Mortgage on office property 241 Penn Ave	$250,001 - $500,000
JT	People's Security Bank	September 2020	Home Equity loan	$15,001 - $50,000
JT	American Express	December 2023	Revolving credit card	$15,001 - $50,000
	People's Security Bank	December 2017	Mortgage on office property 231 Penn Ave	$250,001 - $500,000

Schedule E: Positions

Position	Name of Organization
Trustee (uncompensated)	Hague Personal Residence Trust
Officer (uncompensated)	Archer Partners LLC

Schedule F: Agreements

Date	Parties To	Terms of Agreement
December 2012	Munley Law Firm and filer	Continued participation in profit sharing plan (no new contributions, investment income reinvestment only)

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

- Munley Law Profit Sharing Plan
- Munley Law Profit Sharing Plan (Owner: SP)
- TD Ameritrade Account (Owner: JT)
  Location: US
- Vanguard Investment Account (Owner: JT)
  Location: US
- Archer Partners LLC
  Location: US
- UBS Investment Account (Owner: JT)
- Charles Schwab Investment Account (Owner: JT)
- RBC Investment Account (Owner: JT)

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. Matt Cartwright , 05/01/2025