Filing ID #10063331

Financial Disclosure Report

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

Filer Information

Name: Hon. Patrick T. McHenry
Status: Former Member
State/District: NC10

Filing Information

Filing Type: Terminated Filer Report
Filing Year: 2025
Filing Date: 01/31/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Alliance Bank and Trust [PS] Description: Stock in NC bank; available for public purchase but not publicly traded		$1 - $1,000	None		
Cetera Advisor Networks LLC ⇒ Fidelity Government Cash Reserves [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Cetera Advisor Networks LLC ⇒ iShares Core Growth Allocation ETF (AOR) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
Cetera Advisor Networks LLC ⇒ Vanguard Target Retirement 2045 [MF]	SP	$250,001 - $500,000	Tax-Deferred		
Congressional FCU checking [BA]		$50,001 - $100,000	None		
Congressional FCU Money Market Account [BA]		$100,001 - $250,000	Interest	$2,501 - $5,000	
Locust -Hwy 200 LLC [RP] Location: Locust , NC, US		$15,001 - $50,000	None		
Marsh & McLennan Companies, Inc. (MMC) [ST]	SP	$1,001 - $15,000	Dividends	$1 - $200	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
McHenry-McHenry partnership ⇒ Mortgage Held on 215 Robinson Road [DO]		$100,001 - $250,000	Interest	$5,001 - $15,000	☐
McHenry-Putman Partnership [RP] Location: Gastonia, NC, US Description: 109 W. 8th Ave		$15,001 - $50,000	Rent	$5,001 - $15,000	☐
McHenry-Putman Partnership [RP] Location: Gastonia, NC, US Description: 5524 Union Rd		$50,001 - $100,000	Rent	$5,001 - $15,000	☐
PenFed Credit Union Savings Account [BA]		$1,001 - $15,000	Interest	$1 - $200	☐
Vanguard 529 College Savings Plan ⇒ Vanguard 529 College Savings Plan [5P] Location: NV	DC	$250,001 - $500,000	Tax-Deferred		☐

* 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

None disclosed.

Schedule C: Earned Income

Source	Type	Amount
Federal Communications Commission	spouse salary	N/A
ATT	spouse salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo	October 2020	Mortgage on personal residence, Denver, NC	$250,001 - $500,000
JT	PenFed Credit Union	July 2021	mortgage on personal residence in Washington, DC	$1,000,001 - $5,000,000
JT	Congressional Federal Credit Union	September 2022	Home equity line of credit on Denver, NC home	$100,001 - $250,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Congressional Federal Credit Union	June 2024	Home equity line of credit on Washington, DC home.	$250,001 - $500,000

Schedule E: Positions

Position	Name of Organization
Partner	McHenry-Putman Partnership
Sole Proprietor Comments: No assets	McHenry Real Estate
Partner	McHenry-McHenry partnership

Schedule F: Agreements

None disclosed.

Schedule G: Gifts

None disclosed.

Schedule H: Travel Payments and Reimbursements

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Enterprise Institute	03/8/2024	03/11/2024	Washington, DC - Sea Island, GA - Washington, DC	1	☑	☑	☐

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

- Cetera Advisor Networks LLC (Owner: SP)
- McHenry-McHenry partnership (50% Interest)
  Location: US
- Vanguard 529 College Savings Plan (Owner: DC)
  Location: NV

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
- [x] 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
- [x] 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
- [x] No

Certification and Signature

- [x] 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. Patrick T. McHenry , 01/31/2025