Filing ID #10067304

Financial Disclosure Report

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Filer Information

Name: John Sullivan
Status: Congressional Candidate
State/District: NY17

Filing Information

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 08/17/2025
Period Covered: 01/01/2024– 07/21/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apple Inc. - Common Stock (AAPL) [ST]	JT	$50,001 - $100,000	Dividends	$201 - $1,000	$201 - $1,000
Invesco Rochester Municipal Opportunities Fund Class Y (ORNYX) [MF]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	$201 - $1,000
JP Morgan Chase [BA]	JT	$50,001 - $100,000	Interest	$1 - $200	$1 - $200
Nuveen High Yield Municipal Bd Fd Class I (NHMRX) [MF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$1,001 - $2,500
Washington DC House [RP] Location: Washington, DC, US	JT	$500,001 - $1,000,000	None		
HERITAGE WEALTH MANAGEMENT GROUP ⇒ iShares Core MSCI Europe ETF (IEUR) [EF]	JT	$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
HERITAGE WEALTH MANAGEMENT GROUP ⇒ iShares Expanded Tech-Software Sector ETF (IGV) [EF]	JT	$1,001 - $15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
HERITAGE WEALTH MANAGEMENT GROUP ⇒ iShares MSCI Emerging Markets Asia ETF (EEMA) [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	None
HERITAGE WEALTH MANAGEMENT GROUP ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	$1 - $200
HERITAGE WEALTH MANAGEMENT GROUP ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
HERITAGE WEALTH MANAGEMENT GROUP ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
HERITAGE WEALTH MANAGEMENT GROUP ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
HERITAGE WEALTH MANAGEMENT GROUP ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	$201 - $1,000
HERITAGE WEALTH MANAGEMENT GROUP ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]	JT	$15,001 - $50,000	Dividends	$1 - $200	$1 - $200
HERITAGE WEALTH MANAGEMENT GROUP ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
HERITAGE WEALTH MANAGEMENT GROUP ⇒ Vanguard FTSE Pacific ETF (VPL) [EF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	$201 - $1,000
JP Morgan 529 Savings Account ⇒ NY 529 ADVISOR GUIDED COLLEGE [5P] LOCATION: NY	DC	$50,001 - $100,000	None		
Roth IRA ⇒ Core Fixed Income Fund Class Y (SCFYX) [MF]	SP	$1 - $1,000	Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ Core Fixed Income Fund Class Y (SCFYX) [MF]		$1 - $1,000	Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ International Equity Fund Class Y (SEFCX) [MF]		$1,001 - $15,000	Capital Gains, Dividends	None	$1 - $200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA ⇒ International Equity Fund Class Y (SEFCX) [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends	None	$1 - $200
Roth IRA ⇒ Multi Asset Income Fund Class Y (SLIYX) [MF]		$1 - $1,000	Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ Multi Asset Income Fund Class Y (SLIYX) [MF]	SP	$1 - $1,000	Dividends	$201 - $1,000	$201 - $1,000
Roth IRA ⇒ SEI Index Fund S&P 500 Index Fund Class F (SSPIX) [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$5,001 - $15,000
Roth IRA ⇒ SEI Index Fund S&P 500 Index Fund Class F (SSPIX) [MF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	$201 - $1,000
Roth IRA ⇒ Small Cap Fund Class Y (SMYFX) [MF]		$1 - $1,000	Dividends	$1 - $200	$1 - $200
Roth IRA ⇒ Small Cap Fund Class Y (SMYFX) [MF]	SP	$1 - $1,000	Dividends	$1 - $200	$201 - $1,000
Spouse IRA ⇒ Core Fixed Income Fund Class Y (SCFYX) [MF]	SP	$15,001 - $50,000	Dividends	$201 - $1,000	$1,001 - $2,500
Spouse IRA ⇒ Dynamic Asset Allocation Class Y (SDYYX) [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends	None	$1,001 - $2,500
Spouse IRA ⇒ Emerging Markets Equity Fund Class Y (SEQFX) [MF]	SP	$1,001 - $15,000	Dividends	None	$201 - $1,000
Spouse IRA ⇒ Global Managed Volatility Fund Class Y (SGLYX) [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends	None	$201 - $1,000
Spouse IRA ⇒ International Equity Fund Class Y (SEFCX) [MF]	SP	$15,001 - $50,000	Capital Gains, Dividends	None	$2,501 - $5,000
Spouse IRA ⇒ Multi Asset Income Fund Class Y (SLIYX) [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000
Spouse IRA ⇒	SP	$15,001 - $50,000	Dividends	$201 - $1,000	$5,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SEI Index Fund S&P 500 Index Fund Class F (SSPIX) [MF]					$15,000
Spouse IRA ⇒ Small Cap Fund Class Y (SMYFX) [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$201 - $1,000

* 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 Current Year to Filing	Amount Preceding Year
Federal Government - USAID	Spouse Salary	N/A	N/A
Federal Government - Department of State	Salary	N/A	N/A
Federal Government - Federal Bureau of Investigation	Salary	$66,228.00	$174,157.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Truist	August 2019	DC Home Mortgage	$500,001 - $1,000,000

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

- JP Morgan 529 Savings Account (Owner: DC)
  Location: NY
- Roth IRA
- Roth IRA (Owner: SP)

- Spouse IRA (Owner: SP)
- HERITAGE WEALTH MANAGEMENT GROUP (Owner: JT)

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: John Sullivan , 08/17/2025