Filing ID #10072721

Financial Disclosure Report

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

Filer Information

Name: Rachel Wallace

Status: Congressional Candidate

State/District: PA09

Filing Information

Filing Type: Candidate Report

Filing Year: 2025

Filing Date: 01/27/2026

Period Covered: 01/01/2024– 12/29/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ally Bank [BA]	JT	$100,001 - $250,000	Interest	$5,001 - $15,000	$5,001 - $15,000
Empower 401k Account ⇒ T. Rowe Price Retirement Blend 2055 Fund (TRBOX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		
E-Trade Brokerage Account ⇒ Bank of America Corporation Common Stock (BAC) [ST]	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
E-Trade Brokerage Account ⇒ VanEck Morningstar Wide Moat ETF (MOAT) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
E-Trade Brokerage Account ⇒ Vanguard S&P 500 ETF (VOO) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
E-Trade Brokerage Account ⇒ WisdomTree U.S. MidCap Fund (EZM) [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	$1 - $200
Fidelity Roth IRA ⇒ Fidelity Oxford Street Trust: Fidelity Four-In-One	SP	$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Index Fund (FFNOX) [MF]					
LPL 401k Account ⇒ First Trust Cloud Computing Unit Investment Trust [OT] DESCRIPTION: EIF	SP	$15,001 - $50,000	Tax-Deferred		
LPL 401k Account ⇒ First Trust Cybersecurity Unit Investment Trust [OT] DESCRIPTION: EIF	SP	$1,001 - $15,000	Tax-Deferred		
LPL 401k Account ⇒ First Trust Innovative Tech Unit Investment Trust [OT] DESCRIPTION: EIF	SP	$15,001 - $50,000	Tax-Deferred		
LPL 401k Account ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	$15,001 - $50,000	Tax-Deferred		
LPL 401k Account ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	$15,001 - $50,000	Tax-Deferred		
Principal 401k Account ⇒ LifeTime 2050 Separate Account [OT] DESCRIPTION: EIF		$15,001 - $50,000	Tax-Deferred		
Voya 401k Account ⇒ American Funds 2055 Target Date Retirement Fund Class R-6 (RFKTX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		
Voya 401k Account ⇒ Vanguard Target Retirement 2055 Fund (VFFVX) [MF]	SP	$15,001 - $50,000	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 C: Earned Income

Source	Type	Amount Current Year to Filing	Amount Preceding Year
4C Partners LLC	Spouse Salary	N/A	N/A
Friends of Joanne Phillips	Spouse Salary	N/A	N/A

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Delaware County Democratic Committee	Spouse Salary	N/A	N/A
Morgan for Philly	Spouse Salary	N/A	N/A
Roosevelt Forward	Independent Contractor	N/A	$30,000.00
BFPCC Inc.	Independent Contractor	N/A	$96,690.00
Bonner Group	Independent Contractor	$90,000.00	$60,000.00
Hopewell Fund	Independent Contractor	$22,000.00	N/A
SEI Investments Company	Spouse - distribution from inherited account	N/A	N/A
Fidelity Investments	Spouse - distribution from 401k account	N/A	N/A
LPL Financial	Spouse - distribution from 401k account	N/A	N/A

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
August 2010	American Association of University Women	Continued participation in former employer's 401k plan.

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

None disclosed.

Schedule A Investment Vehicle Details

- E-Trade Brokerage Account (Owner: SP)
- Voya 401k Account (Owner: SP)
- Voya 401k Account (Owner: SP)
- LPL 401k Account (Owner: SP)
- Empower 401k Account (Owner: SP)

- Fidelity Roth IRA (Owner: SP)
- Principal 401k Account

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: Rachel Wallace , 01/27/2026