



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Dr. Aaron Gies  
**Status:** Congressional Candidate  
**State/District:** NY23

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 02/13/2026  
**Period Covered:** 01/01/2025– 01/13/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset            | Income Type(s) | Income Current Year to Filing | Income Preceding Year   |
|--|-------|---------------------------|----------------|-------------------------------|-------------------------|
| Enchanted Mountains Vet. Care PLLC, 100% Interest [OL]                           | SP    | \$1,000,001 - \$5,000,000 | Flow Through   | \$100,001 - \$1,000,000       | \$100,001 - \$1,000,000 |
| LOCATION: NY, NY, US   |       |                           |                |                               |                         |
| DESCRIPTION: Flow through income from a sub chapter S corporation.               |       |                           |                |                               |                         |
| 401K ⇒<br>American Funds - SMALLCAP World Fund Inc Class R-2 Shares (RSLBX) [MF] | SP    | \$1,001 - \$15,000        | Tax-Deferred   |                               |                         |
| 401K ⇒<br>American Funds - The New Economy Fund Class R-2 Shares (RNGBX) [MF]    | SP    | \$15,001 - \$50,000       | Tax-Deferred   |                               |                         |
| 401K ⇒<br>American Funds Global Balanced Fd Cl R-2 (RGGBX) [MF]                  | SP    | \$15,001 - \$50,000       | Tax-Deferred   |                               |                         |
| 401K ⇒<br>New Perspective Fund, Class R-2 Shares (RNPBX) [MF]                    | SP    | \$15,001 - \$50,000       | Tax-Deferred   |                               |                         |
| 401K ⇒<br>The Bond Fund of America, Class R-2 Shares                             | SP    | \$1,001 - \$15,000        | Tax-Deferred   |                               |                         |

| <b>Asset</b>   | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| (RFBFX) [MF]   |              |                       |                       |                                      |                              |
| 401K ⇒<br>The Growth Fund of America Class R-2 Shares (RGABX) [MF]   | SP           | \$50,001 - \$100,000  | Tax-Deferred          |                                      |                              |
| 401K ⇒<br>The Income Fund of America, Class R-2 Shares (RIDBX) [MF]  | SP           | \$15,001 - \$50,000   | Tax-Deferred          |                                      |                              |
| 529 ⇒<br>American Balanced Fund, Class 529-A Shares (CLBAX) [MF]     | SP           | \$15,001 - \$50,000   | None                  |                                      |                              |
| 529 ⇒<br>American Funds College 2039 Fund Class 529-A (CDJAX) [MF]   | SP           | \$15,001 - \$50,000   | None                  |                                      |                              |
| 529 ⇒<br>American Funds College 2039 Fund Class 529-A (CDJAX) [MF]   | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| 529 ⇒<br>American Funds College Fund 2036 Class 529-A (CCFAX) [MF]   | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |
| 529 ⇒<br>The Growth Fund of America Class 529-A Shares (CGFAX) [MF]  | SP           | \$15,001 - \$50,000   | None                  |                                      |                              |
| 529 ⇒<br>The Income Fund of America, Class 529-A Shares (CIMAX) [MF] | SP           | \$15,001 - \$50,000   | None                  |                                      |                              |
| Annuity ⇒<br>RILA [OT]<br>DESCRIPTION: RILA Annuity in IRA           | SP           | \$250,001 - \$500,000 | Tax-Deferred          |                                      |                              |
| Annuity ⇒ Annuity ⇒<br>RILA [OT]<br>DESCRIPTION: RILA annuity in IRA | SP           | \$50,001 - \$100,000  | Tax-Deferred          |                                      |                              |
| Brokerage Account ⇒<br>AMCAP Fund, Class A Shares A (AMCPX) [MF]     | JT           | \$50,001 - \$100,000  | Capital Gains         | \$2,501 - \$5,000                    | \$2,501 - \$5,000            |

| <b>Asset</b>  | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b>    | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|---|--------------|-----------------------|--------------------------|--------------------------------------|------------------------------|
| Brokerage Account ⇒<br>American Balanced Fund, Class A Shs (ABALX) [MF]                           | JT           | \$1,001 - \$15,000    | Capital Gains            | None                                 | \$2,501 - \$5,000            |
| Brokerage Account ⇒<br>American Fds, American High-Income Municipal Bond Fd, Class A (AMHIX) [MF] | JT           | \$15,001 - \$50,000   | None                     |                                      |                              |
| Brokerage Account ⇒<br>American Funds Global Insight Fund Class A (AGVFX) [MF]                    | JT           | \$50,001 - \$100,000  | None                     |                                      |                              |
| Brokerage Account ⇒<br>American Funds Inflation Linked Bond Fund - Class A (BFIAX) [MF]           | JT           | \$15,001 - \$50,000   | None                     |                                      |                              |
| Brokerage Account ⇒<br>American Funds Investment Co of America A (AIVSX) [MF]                     | JT           | \$50,001 - \$100,000  | Capital Gains            | \$201 - \$1,000                      | \$2,501 - \$5,000            |
| Brokerage Account ⇒<br>American Funds U.S. Government Money Market Fund Class A (AFAXX) [MF]      | JT           | \$1 - \$1,000         | Dividends                | \$201 - \$1,000                      | None                         |
| Brokerage Account ⇒<br>American Mutual Fund Class A Shares (AMRMX) [MF]                           | JT           | \$50,001 - \$100,000  | Capital Gains            | None                                 | \$1,001 - \$2,500            |
| Brokerage Account ⇒<br>Fundamental Investors, Class A Shares (ANCFX) [MF]                         | JT           | \$50,001 - \$100,000  | Capital Gains            | \$1,001 - \$2,500                    | \$2,501 - \$5,000            |
| Brokerage Account ⇒<br>The Bond Fund of America, Class A Shares (ABNDX) [MF]                      | JT           | \$15,001 - \$50,000   | Dividends                | \$201 - \$1,000                      | None                         |
| Brokerage Account ⇒<br>The Growth Fund of America Class A Shares (AGTHX) [MF]                     | JT           | \$15,001 - \$50,000   | Capital Gains            | None                                 | \$2,501 - \$5,000            |
| Brokerage Account ⇒<br>The Income Fund of America, Class A Shares (AMECX) [MF]                    | JT           | \$1,001 - \$15,000    | Capital Gains, Dividends | \$201 - \$1,000                      | \$1,001 - \$2,500            |
| Roth IRA ⇒<br>AMCAP Fund, Class A Shares A (AMCPX) [MF]   |              | \$1,001 - \$15,000    | None                     |                                      |                              |

| <b>Asset</b>   | <b>Owner</b> | <b>Value of Asset</b> | <b>Income Type(s)</b> | <b>Income Current Year to Filing</b> | <b>Income Preceding Year</b> |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Roth IRA ⇒<br>American Balanced Fund, Class A Shs (ABALX) [MF]                   |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Roth IRA ⇒<br>American Funds Investment Co of America A (AIVSX) [MF]             |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Roth IRA ⇒<br>The Growth Fund of America Class A Shares (AGTHX) [MF]             |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Roth IRA ⇒<br>The Income Fund of America, Class A Shares (AMECX) [MF]            |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Roth IRA ⇒ Roth IRA ⇒<br>AMCAP Fund, Class A Shares A (AMCPX) [MF]               |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Roth IRA ⇒ Roth IRA ⇒<br>American Balanced Fund, Class A Shs (ABALX) [MF]        |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Roth IRA ⇒ Roth IRA ⇒<br>American Funds Investment Co of America A (AIVSX) [MF]  |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Roth IRA ⇒ Roth IRA ⇒<br>The Growth Fund of America Class A Shares (AGTHX) [MF]  |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Roth IRA ⇒ Roth IRA ⇒<br>The Income Fund of America, Class A Shares (AMECX) [MF] |              | \$1,001 - \$15,000    | None                  |                                      |                              |
| Whole Life Insurance ⇒<br>Whole life policy [WU]                                 | SP           | \$15,001 - \$50,000   | None                  |                                      |                              |
| Whole Life Insurance ⇒<br>Whole life policy [WU]                                 | SP           | \$1,001 - \$15,000    | None                  |                                      |                              |

\* 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 |
|---|---------------|-------------------------------|-----------------------|
| St. Bonaventure University              | Salary        | \$2,201.00                    | \$57,006.00           |
| Enchanted Mountain Veterinary Care PLLC | Spouse Salary | \$67,305.00                   | \$250,000.00          |

## SCHEDULE D: LIABILITIES

| Owner | Creditor    | Date Incurred  | Type                    | Amount of Liability   |
|-------|-------------|----------------|-------------------------|-----------------------|
| SP    | Wells Fargo | September 2021 | long-term business loan | \$250,001 - \$500,000 |
|       | NYSERDA     | May 2024       | Solar Panel Loan        | \$15,001 - \$50,000   |

## SCHEDULE E: POSITIONS

| Position            | Name of Organization       |
|---------------------|----------------------------|
| Assistant Professor | St. Bonaventure University |
| Board Chair         | Canticle Farm, Inc.        |

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- o Roth IRA  
DESCRIPTION: Owned by just myself. Roth IRA
- o Whole Life Insurance (Owner: SP)  
LOCATION: Olean, NY, US
- o Whole Life Insurance (Owner: SP)  
LOCATION: Olean, NY, US
- o Annuity (Owner: SP)
- o Brokerage Account (Owner: JT)
- o 401K (Owner: SP)
- o 529 (Owner: SP)  
LOCATION: VA
- o 529 (Owner: SP)

LOCATION: VA

- 529 (Owner: SP)

LOCATION: VA

- 529 (Owner: SP)

LOCATION: VA

- Annuity ⇒ Annuity (Owner: SP)

- Roth IRA ⇒ Roth IRA

DESCRIPTION: Wife's Roth IRA

## 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:** Dr. Aaron Gies , 02/13/2026