



Filing ID #10073096

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Karen Ortiz
Status: Congressional Candidate
State/District: NY12

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 10/22/2026
Period Covered: 01/01/2025– 01/24/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rollover IRA ⇒ Schwab 1000 Index ETF (SCHK) [EF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Rollover IRA held by Charles Schwab & Co; Administered by Capital Investment Advisors					
Roth IRA ⇒ Roth IRA [IH]		\$1,001 - \$15,000	None		
DESCRIPTION: Roth IRA held by Charles Schwab & Co Inc administered by Capital Investment Advisors					

* 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
EQUAL EMPLOYMENT OPPORTUNITY COMMISSION	my salary	\$101,518.00	N/A
NEW YORK STATE	UNEMPLOYMENT	\$15,972.00	N/A

SCHEDULE D: LIABILITIES

None disclosed.

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

◦ Roth IRA DESCRIPTION: Roth IRA under Charles Schwab & Co Inc ◦ Rollover IRA DESCRIPTION: Rollover IRA under Charles Schwab & Co

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: Karen Ortiz , 10/22/2026