



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Megan O'Rourke
Status: Congressional Candidate
State/District: NJ07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 02/25/2026
Period Covered: 01/01/2024– 08/07/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rust Reunion Investment Club ⇒ AMG River Road Dividend All Cap Value Fund - Class I (ARIDX) [MF]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Rust Reunion Investment Club ⇒ BlackRock Inflation Protected Bond Portfolio - Institutional (BPRIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Rust Reunion Investment Club ⇒ Champlain Mid Cap Fund (CIPMX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Rust Reunion Investment Club ⇒ Dodge & Cox Global Stock Fund - Class I (DODWX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Rust Reunion Investment Club ⇒ Edgewood Growth Fund Insti (EGFIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$2,501 - \$5,000	\$1,001 - \$2,500
Rust Reunion Investment Club ⇒ MFS Emerging Markets Debt Fund Class I (MEDIX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Rust Reunion Investment Club ⇒	SP	\$1,001 - \$15,000	Capital Gains,	\$201 -	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
MFS Value Fund - Class I (MEIIX) [MF]			Dividends	\$1,000	\$1,000
Rust Reunion Investment Club ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Rust Reunion Investment Club ⇒ T. Rowe Price Small-Cap Value Fd Inc. (PRSVX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Rust Reunion Investment Club ⇒ Virtus SGA Emerging Markets Equity Fund - I (HIEMX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Inherited IRA ⇒ American Century MidCap Value Investor Class (ACMVX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Inherited IRA ⇒ Green Century Equity Fund - Investor Class (GCEQX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Inherited IRA ⇒ Invesco DB Agriculture Fund (DBA) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Schwab Inherited IRA ⇒ Nuveen Real Estate Securities Select Fund A (TCREX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Inherited IRA ⇒ Schwab Dividend Equity Fund - Select Shares (SWDSX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ ALPS/CoreCommodity Management CompleteCommodities Strategy Fund - Investor Class (JCRAK) [MF]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ American Funds New World Fund Cl F-1Shs (NWFFX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ Comfort Systems USA, Inc. Common Stock (FIX) [ST]	JT	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab non-retirement account ⇒ Franklin Gold and Precious Metals Fund Class A (FKRCX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab non-retirement account ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ iShares Morningstar Mid-Cap Value ETF (IMCV) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ iShares Russell Small/Mid-Cap Index Fund - Class A (BSMAX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ Nuveen Real Estate Securities Select Fund A (TCREX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ RBC SMID Cap Growth Fund Class I (TMCIX) [MF]	JT	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ Schwab Fundamental US Small Company Index Fd (SFSNX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ Schwab U.S. Aggregate Bond Index Fund (SWAGX) [MF]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ Schwab U.S. Large-Cap Growth Index Fund (SWLGX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ Schwab U.S. Large-Cap Value Index Fund (SWLVX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ T. Rowe Price U.S. Equity Research Fund (PRCOX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ T. Rowe Price Ultra Short-Term Bond Fund (TRBUX) [MF]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab non-retirement account ⇒ U.S. Global Jets ETF (JETS) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ Vanguard Small-Cap Growth ETF (VBK) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab non-retirement account ⇒ Victory Pioneer Global Equity Fund Class Y (PGSYX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
Scwab IRA Aaron ⇒ abrdrn Physical Precious Metals Basket Shares ETF (GLTR) [EF]	SP	\$1,001 - \$15,000	None		
Scwab IRA Aaron ⇒ PIMCO All Asset Class A (PASAX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Scwab IRA Aaron ⇒ PIMCO Dividend and Income Fund Class A (PQIZX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Scwab IRA Aaron ⇒ Schwab prime advantage money market [BA]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1 - \$200
Scwab IRA Aaron ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Scwab Roth IRA Aaron ⇒ Amplify Lithium & Battery Technology ETF (BATT) [EF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Scwab Roth IRA Aaron ⇒ Davis Financial Fund, Inc. Class A (RPFGX) [MF]	SP	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Scwab Roth IRA Aaron ⇒ Global X Lithium & Battery Tech ETF (LIT) [EF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Scwab Roth IRA Aaron ⇒ Green Century Balanced Fund (GCBLX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Scwab Roth IRA Aaron ⇒ Green Century Equity Fund - Investor Class (GCEQX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Scwab Roth IRA Aaron ⇒ Green Century MSCI Intl Index Fd Individual Inv Cl (GCINX) [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Scwab Roth IRA Aaron ⇒ iShares Core MSCI Total International Stock ETF (IXUS) [EF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Scwab Roth IRA Aaron ⇒ iShares Morningstar Mid-Cap Value ETF (IMCV) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Scwab Roth IRA Aaron ⇒ PGIM High Yield Fund Class Z (PHYZX) [MF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
TIAA CREF VA retirement ⇒ Nuveen LFCycle 2045 R6 [EQ]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$2,501 - \$5,000
Vanguard non-retirement ⇒ Vanguard Federal Money Market Fund [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Roth IRA Megan ⇒ ARK Genomic Revolution ETF (ARKG) [EF]		\$1 - \$1,000	None		
Vanguard Roth IRA Megan ⇒ Global X Robotics & Artificial Intelligence ETF (BOTZ) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Roth IRA Megan ⇒ iShares Global Clean Energy ETF (ICLN) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Roth IRA Megan ⇒ Vanguard Federal Money Market Fund [BA]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

* 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
US Department of Agriculture	Salary	\$.00	\$142,123.69

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	First Bank & Trust	July 2014	Home loan	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Authorized agent	Rust Reunion Investment Club

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Schwab Inherited IRA (Owner: SP)
DESCRIPTION: Inherited IRA
- Schwab non-retirement account (Owner: JT)
- Schwab Roth IRA Aaron (Owner: SP)
- Schwab IRA Aaron (Owner: SP)
- Vanguard non-retirement (Owner: JT)
- TIAA CREF VA retirement
- Rust Reunion Investment Club (10% Interest) (Owner: SP)
DESCRIPTION: Funds family reunions
- Vanguard Roth IRA Megan

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: Megan O'Rourke , 02/25/2026