



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Robert Tyler Macallister
Status: Congressional Candidate
State/District: MA09

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2025
Filing Date: 10/05/2026
Period Covered: 01/01/2024– 07/06/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
RTM Fisheries [OL] LOCATION: Mattapoisett, MA, US DESCRIPTION: Fishery consultant and charters		\$250,001 - \$500,000	Dividends	\$50,001 - \$100,000	\$50,001 - \$100,000
US bank account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Walden Cape Code Solar, 20% Interest [OL] LOCATION: New York, NY, US DESCRIPTION: solar energy		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Schwab Brokerage Account ⇒ Enphase Energy, Inc. - Common Stock (ENPH) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Brokerage Account ⇒ iShares Core 80/20 Aggressive Allocation ETF (AOA) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Brokerage Account ⇒ PIMCO Fds Stockplus Cl A (PSPAX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab Brokerage Account ⇒ Putnam Sustainable Future Fund Class A (PMVAX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Brokerage Account ⇒ US bank account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Schwab Brokerage Account ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab IRA 1 ⇒ Enphase Energy, Inc. - Common Stock (ENPH) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab IRA 1 ⇒ iShares Core 80/20 Aggressive Allocation ETF (AOA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 1 ⇒ PIMCO Fds Stockplus Cl A (PSPAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA 1 ⇒ Putnam Sustainable Future Fund Class A (PMVAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA 1 ⇒ US bank account [BA]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 1 ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 1 ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ Baird Aggregate Bond Fund Institutional Class (BAGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ Baird Short Term Bond Fund Institutional Class (BSBIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ BlackRock Total Return Fund BlackRock Class		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(MPHQX) [MF]					
Schwab IRA 2 ⇒ Cohen & Steers Realty Shares, Inc. Class I (CSJIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ Dodge & Cox International Stock Fund - Class I (DODFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ Dodge & Cox Stock Fund - Class I (DODGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ Driehaus Emerging Markets Growth Fund Institutional Share Class (DIEMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ Invesco Oppenheimer International Growth Fund Class R6 (OIGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ JPMorgan Core Bond Fund R6 (JCBUX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ JPMorgan Large Cap Growth Fund I Class (SEEGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ JPMorgan U.S. Research Enhanced Equity Fund - R6 Class (JDEUX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ MFS International Equity Fund - Class I (MIEKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ Northern Funds Small Cap Value Fund (NOSGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ PGIM Global Total Return Fund Class Z (PZTRX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ Principal Fds, Inc. SmallCap Fund, Institutional Class (PSLIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab IRA 2 ⇒ Pzena Emerging Markets Value Fund - Institutional Class (PZIEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ T. Rowe Price Blue Chip Growth Fund - I Class (TBCIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ T. Rowe Price Equity Income Fund - I Class (REIPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 2 ⇒ US bank account [BA]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ iShares Core MSCI Pacific ETF (IPAC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ State Street Communication Services Select Sector SPDR ETF (XLC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ State Street Consumer Discretionary Select Sector SPDR ETF (XLY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ State Street Consumer Staples Select Sector SPDR ETF (XLP) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ State Street Energy Select Sector SPDR ETF (XLE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab IRA 3 ⇒ State Street Industrial Select Sector SPDR ETF (XLI) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ State Street Technology Select Sector SPDR ETF (XLK) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ US bank account [BA]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA 3 ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ Vanguard Morningstar Small-Cap Growth ETF (VBK) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ Vanguard Morningstar Small-Cap Value ETF (VBR) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ Vanguard Real Estate ETF (VNQ) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 3 ⇒ Vanguard Total Bond Market ETF (BND) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ BlackRock Total Return Fund BlackRock Class (MPHQX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ Champlain Mid Cap Fund Insti Cl (CIPIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ Cohen & Steers Realty Shares, Inc. Class I (CSJIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ Dodge & Cox International Stock Fund - Class I		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(DODFX) [MF]					
Schwab IRA 4 ⇒ Dodge & Cox Stock Fund - Class I (DODGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ Invesco Oppenheimer International Growth Fund Class R6 (OIGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ JPMorgan Core Bond Fund R6 (JCBUX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ JPMorgan Large Cap Growth Fund I Class (SEEGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ JPMorgan U.S. Research Enhanced Equity Fund - R6 Class (JDEUX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ Northern Funds Small Cap Value Fund (NOSGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ PRIMECAP Odyssey Stock Fund (POSKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ T. Rowe Price Blue Chip Growth Fund - I Class (TBCIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ T. Rowe Price Emerging Markets Stock Fund - I Class (PRZIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 4 ⇒ T. Rowe Price Equity Income Fund - I Class (REIPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 5 ⇒ Citizens Financial Group, Inc. Common Stock (CFG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA 5 ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab IRA 5 ⇒ T. Rowe Price Retirement 2030 Fund (TRRCX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab IRA 5 ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA 1 ⇒ Putnam Large Cap Growth Class A (POGAX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roth IRA 1 ⇒ T. Rowe Price Global Technology Fd Inc (PRGTX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roth IRA 2 ⇒ Citizens Financial Group, Inc. Common Stock (CFG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA 2 ⇒ Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA 2 ⇒ Victory Pioneer Fundamental Growth Fund Class A (PIGFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab SEP IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Schwab SEP IRA ⇒ Citizens Financial Group, Inc. Common Stock (CFG) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Schwab SEP IRA ⇒ Enphase Energy, Inc. - Common Stock (ENPH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab SEP IRA ⇒ Invesco Dorsey Wright Energy Momentum ETF (PXI) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab SEP IRA ⇒ Invesco Main Street Fund Class A (MSIGX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Schwab SEP IRA ⇒ T. Rowe Price Group, Inc. - Common Stock (TROW)		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[ST]					
Schwab SEP IRA ⇒ US bank account [BA]		\$15,001 - \$50,000	Tax-Deferred		
Schwab SEP IRA ⇒ Wells Fargo & Company Common Stock (WFC) [ST]		\$1,001 - \$15,000	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
Energy Auction House Inc.	Salary	\$28,444.00	\$21,738.00
Mechanic's Square Partnership	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Owner	RTM Fisheries
Partner	Walden Cape Cod Solar

SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Energy Auction House Inc. (Sandwich, MA, US)	energy broker
Sold State Marine, LLC (Bridgewater, MA, US)	consulting
Town of Mattapoisett (Mattapoisett, MA, US)	boat charters
Commonwealth of Massachusetts (Boston, MA, US)	boat charters

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Schwab IRA 1
- Schwab IRA 5
- Schwab Roth IRA 2
- Schwab IRA 2
- Schwab IRA 3
- Schwab IRA 4
- Schwab Roth IRA 1
- Schwab Brokerage Account (Owner: JT)
- Schwab SEP 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: Robert Tyler Macallister , 10/05/2026