



Filing ID #10076063

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: 2026
Filing Date: 08/13/2026
Period Covered: 01/01/2025– 07/14/2026

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	\$2,501 - \$5,000	\$5,001 - \$15,000
Residential Real Property [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	None
LOCATION: Washington, DC, US					
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 ⇒	SP	\$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
WisdomTree U.S. MidCap Fund (EZM) [EF]					
Fidelity Roth IRA ⇒ Fidelity Oxford Street Trust: Fidelity Four-In-One Index Fund (FFNOX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
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
Hopewell Fund	Independent Contractor	N/A	\$22,000.00
Bonner Group	Independent Contractor	N/A	\$90,000.00
Morgan for Philly	Spouse Salary	N/A	N/A
Scanlon for Congress	Spouse Salary	N/A	N/A
Friends of Judy Trombetta	Spouse Fees	N/A	N/A
Delaware County Democratic Committee	Spouse Salary	N/A	N/A
LPL Financial	Spouse - distribution from 401k account	N/A	N/A
Friends of Joanne Phillips	Spouse Salary	N/A	N/A
4C Partners	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	JPMorgan Chase	July 2016	Mortgage on Rental Property	\$250,001 - \$500,000

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

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

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

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 , 08/13/2026