



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Beth Davidson  
**Status:** Congressional Candidate  
**State/District:** NY17

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2026  
**Filing Date:** 05/18/2026  
**Period Covered:** 01/01/2025– 05/15/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chase Self Directed Account ⇒ Fidelity Treasury Only Money Markey Fund (FDLXX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Chase Self Directed Account ⇒ JP Morgan Premium Deposit [BA]	SP	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Colgate-Palmolive Brokerage Account ⇒ Colgate-Palmolive Company Common Stock (CL) [ST]	SP	\$15,001 - \$50,000	None		
Crypto Currency ⇒ Bitcoin [CT]	SP	\$1,001 - \$15,000	None		
Crypto Currency ⇒ Ether [CT]	SP	\$1,001 - \$15,000	None		
E-Trade Brokerage Account ⇒ CrowdStrike Holdings, Inc. - Class A Common Stock (CRWD) [ST]	SP	\$50,001 - \$100,000	None		
E-Trade Brokerage Account ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	SP	\$15,001 - \$50,000	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>
E-Trade Brokerage Account ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	SP	\$15,001 - \$50,000	None		
E-Trade Brokerage Account ⇒ Intuit Inc. - Common Stock (INTU) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
E-Trade Brokerage Account ⇒ Intuit Inc. - Common Stock (INTU) [ST]	SP	\$15,001 - \$50,000	None		
E-Trade Brokerage Account ⇒ Snap Inc. Class A Common Stock (SNAP) [ST]	SP	\$1,001 - \$15,000	None		
First Manhattan Brokerage - Jeff ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	None	Capital Gains	None	\$15,001 - \$50,000
First Manhattan Brokerage - Jeff ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
First Manhattan Brokerage - Jeff ⇒ AutoZone, Inc. Common Stock (AZO) [ST]	SP	\$250,001 - \$500,000	None		
First Manhattan Brokerage - Jeff ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	SP	\$100,001 - \$250,000	None		
First Manhattan Brokerage - Jeff ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]	SP	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
First Manhattan Brokerage - Jeff ⇒ CHAPTERS GROUP AG (MDCKF) [ST]	SP	\$15,001 - \$50,000	None		
First Manhattan Brokerage - Jeff ⇒ Dreyfus Government Cash Management - Institutional Shares (DGCXX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
First Manhattan Brokerage - Jeff ⇒ Intercontinental Exchange Inc. Common Stock (ICE) [ST]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
First Manhattan Brokerage - Jeff ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
First Manhattan Brokerage - Jeff ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$100,001 - \$250,000	Dividends	\$1 - \$200	\$1 - \$200

<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>
First Manhattan Brokerage - Jeff ⇒ S&P Global Inc. Common Stock (SPGI) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
First Manhattan Brokerage - Jeff ⇒ Synopsys, Inc. - Common Stock (SNPS) [ST]	SP	\$100,001 - \$250,000	None		
First Manhattan Brokerage - Jeff ⇒ Uber Technologies, Inc. Common Stock (UBER) [ST]	SP	\$50,001 - \$100,000	None		
First Manhattan IRA - Beth ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		None	Capital Gains	\$201 - \$1,000	None
First Manhattan IRA - Beth ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$1,001 - \$15,000	None		
First Manhattan IRA - Beth ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
First Manhattan IRA - Beth ⇒ AutoZone, Inc. Common Stock (AZO) [ST]		\$1,001 - \$15,000	None		
First Manhattan IRA - Beth ⇒ Boston Scientific Corporation Common Stock (BSX) [ST]		None	None		
First Manhattan IRA - Beth ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
First Manhattan IRA - Beth ⇒ CHAPTERS GROUP AG (MDCKF) [ST]		\$1,001 - \$15,000	None		
First Manhattan IRA - Beth ⇒ Copart, Inc. - Common Stock (CPRT) [ST]		None	None		
First Manhattan IRA - Beth ⇒ Danaher Corporation Common Stock (DHR) [ST]		None	Capital Gains	None	\$201 - \$1,000
First Manhattan IRA - Beth ⇒ Dreyfus Government Cash Management - Institutional Shares (DGCXX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
First Manhattan IRA - Beth ⇒		None	Capital Gains	None	\$1,001 -

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Eli Lilly and Company Common Stock (LLY) [ST]					\$2,500
First Manhattan IRA - Beth ⇒ Intercontinental Exchange Inc. Common Stock (ICE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
First Manhattan IRA - Beth ⇒ LandBridge Company LLC Class A Shares Representing Limited Liability Company Interests (LB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
First Manhattan IRA - Beth ⇒ Mastercard Incorporated Common Stock (MA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
First Manhattan IRA - Beth ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
First Manhattan IRA - Beth ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
First Manhattan IRA - Beth ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]		None	Capital Gains	\$201 - \$1,000	None
First Manhattan IRA - Beth ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
First Manhattan IRA - Beth ⇒ Oracle Corporation Common Stock (ORCL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
First Manhattan IRA - Beth ⇒ S&P Global Inc. Common Stock (SPGI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
First Manhattan IRA - Beth ⇒ Synopsys, Inc. - Common Stock (SNPS) [ST]		\$1,001 - \$15,000	None		
First Manhattan IRA - Beth ⇒ Uber Technologies, Inc. Common Stock (UBER) [ST]		\$1,001 - \$15,000	None		
First Manhattan IRA - Jeff ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]	SP	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
First Manhattan IRA - Jeff ⇒ Aspen Technology, Inc. - Common Stock (AZPN) [ST]	SP	None	Capital Gains	None	\$1,001 - \$2,500

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First Manhattan IRA - Jeff ⇒ LandBridge Company LLC Class A Shares Representing Limited Liability Company Interests (LB) [ST]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
HSBC Savings Account ⇒ Cash [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1,001 - \$2,500
Hugo Trust ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	DC	None	Capital Gains	None	\$201 - \$1,000
Hugo Trust ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	DC	\$15,001 - \$50,000	None		
Hugo Trust ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Hugo Trust ⇒ Aspen Technology, Inc. - Common Stock (AZPN) [ST]	DC	None	Capital Gains	None	\$2,501 - \$5,000
Hugo Trust ⇒ AutoZone, Inc. Common Stock (AZO) [ST]	DC	\$15,001 - \$50,000	None		
Hugo Trust ⇒ Boston Scientific Corporation Common Stock (BSX) [ST]	DC	None	None		
Hugo Trust ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Hugo Trust ⇒ CHAPTERS GROUP AG (MDCKF) [ST]	DC	\$1,001 - \$15,000	None		
Hugo Trust ⇒ Copart, Inc. - Common Stock (CPRT) [ST]	DC	None	Capital Gains	\$2,501 - \$5,000	None
Hugo Trust ⇒ Danaher Corporation Common Stock (DHR) [ST]	DC	None	Capital Gains	None	\$2,501 - \$5,000
Hugo Trust ⇒ Eli Lilly and Company Common Stock (LLY) [ST]	DC	None	Capital Gains	\$5,001 - \$15,000	None
Hugo Trust ⇒ Intercontinental Exchange Inc. Common Stock (ICE) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200

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Hugo Trust ⇒ LandBridge Company LLC Class A Shares Representing Limited Liability Company Interests (LB) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Hugo Trust ⇒ LVMH Moet Hennessy Louis Vuitton Ordinary Shares (LVMHF) [ST]	DC	None	Capital Gains	None	\$1,001 - \$2,500
Hugo Trust ⇒ Mastercard Incorporated Common Stock (MA) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	None
Hugo Trust ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Hugo Trust ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Hugo Trust ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]	DC	None	Capital Gains	None	\$2,501 - \$5,000
Hugo Trust ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Hugo Trust ⇒ Oracle Corporation Common Stock (ORCL) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Hugo Trust ⇒ S&P Global Inc. Common Stock (SPGI) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Hugo Trust ⇒ Synopsys, Inc. - Common Stock (SNPS) [ST]	DC	\$15,001 - \$50,000	None		
Hugo Trust ⇒ Thermo Fisher Scientific Inc Common Stock (TMO) [ST]	DC	None	Capital Gains	None	\$2,501 - \$5,000
Hugo Trust ⇒ Uber Technologies, Inc. Common Stock (UBER) [ST]	DC	\$15,001 - \$50,000	None		
Hugo Trust ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	DC	None	Capital Gains	None	\$201 - \$1,000
Josie Trust ⇒	DC	None	Capital Gains	None	\$1,001 -

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Alphabet Inc. - Class A Common Stock (GOOGL) [ST]					\$2,500
Josie Trust ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	DC	\$15,001 - \$50,000	None		
Josie Trust ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Josie Trust ⇒ Aspen Technology, Inc. - Common Stock (AZPN) [ST]	DC	None	Capital Gains	None	\$5,001 - \$15,000
Josie Trust ⇒ AutoZone, Inc. Common Stock (AZO) [ST]	DC	\$15,001 - \$50,000	None		
Josie Trust ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Josie Trust ⇒ CHAPTERS GROUP AG (MDCKF) [ST]	DC	\$1,001 - \$15,000	None		
Josie Trust ⇒ Danaher Corporation Common Stock (DHR) [ST]	DC	None	Capital Gains	None	\$2,501 - \$5,000
Josie Trust ⇒ Dreyfus Government Cash Management - Institutional Shares (DGCXX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Josie Trust ⇒ Intercontinental Exchange Inc. Common Stock (ICE) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Josie Trust ⇒ LandBridge Company LLC Class A Shares Representing Limited Liability Company Interests (LB) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Josie Trust ⇒ Mastercard Incorporated Common Stock (MA) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	None
Josie Trust ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Josie Trust ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Josie Trust ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]	DC	None	Capital Gains	None	\$2,501 - \$5,000
Josie Trust ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Josie Trust ⇒ Oracle Corporation Common Stock (ORCL) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Josie Trust ⇒ S&P Global Inc. Common Stock (SPGI) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Josie Trust ⇒ Synopsys, Inc. - Common Stock (SNPS) [ST]	DC	\$15,001 - \$50,000	None		
Josie Trust ⇒ T-Bills [GS]	DC	\$15,001 - \$50,000	None		
Josie Trust ⇒ Thermo Fisher Scientific Inc Common Stock (TMO) [ST]	DC	None	Capital Gains	None	\$2,501 - \$5,000
Josie Trust ⇒ Uber Technologies, Inc. Common Stock (UBER) [ST]	DC	\$15,001 - \$50,000	None		
Josie Trust ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	DC	None	Capital Gains	None	\$201 - \$1,000
Roth IRA - Jeff ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	SP	\$1,001 - \$15,000	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
Colgate-Palmolive	Spouse Salary	N/A	N/A
RenUSA	Freelance Earnings	N/A	\$1,375.00
Burdick Consulting	Freelance Earnings	\$9,900.00	\$14,825.00

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Alsobrooks for Senate	Freelance Earnings	N/A	\$1,500.00
Avalon Consulting	Freelance Earnings	N/A	\$3,600.00
Cat Eye Studios	Freelance Earnings	N/A	\$25,350.00
JRAdvising, Inc	Spouse Salary	N/A	N/A
County of Rockland	Legislature Salary	\$23,730.00	\$71,191.00

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
Vice President / Trustee	Nyack School Board

### 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
Cat Eye Studios (Torrence, CA, US)	Writing

### SCHEDULE A INVESTMENT VEHICLE DETAILS

- o First Manhattan IRA - Beth  
DESCRIPTION: Beth's retirement savings
- o First Manhattan IRA - Jeff (Owner: SP)  
DESCRIPTION: Jeff's retirement portfolio
- o First Manhattan Brokerage - Jeff (Owner: SP)  
DESCRIPTION: Jeff's stock portfolio at First Manhattan
- o Roth IRA - Jeff (Owner: SP)  
DESCRIPTION: Jeff's Roth IRA managed by First Manhattan
- o Josie Trust (Owner: DC)  
DESCRIPTION: Josie's Trust fund managed by First Manhattan
- o Hugo Trust (Owner: DC)  
DESCRIPTION: Hugo's Trust
- o Colgate-Palmolive Brokerage Account (Owner: SP)

DESCRIPTION: Colgate stock

- E-Trade Brokerage Account (Owner: SP)  
DESCRIPTION: E-Trade stock account
- Crypto Currency (Owner: SP)  
LOCATION: US  
DESCRIPTION: Jeff's crypto
- HSBC Savings Account (Owner: SP)  
LOCATION: US  
DESCRIPTION: Jeff's HSBC Savings Account
- Chase Self Directed Account (Owner: SP)  
DESCRIPTION: Jeff's Chase Investment Account - Money Market Fund

## 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:** Beth Davidson , 05/18/2026