



Filing ID #10083005

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Dr. Aaron Gies  
**Status:** Congressional Candidate  
**State/District:** NY23

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2026  
**Filing Date:** 10/07/2026  
**Period Covered:** 01/01/2025– 04/15/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset                                                                            | Owner | Value of Asset            | Income Type(s) | Income Current Year to Filing | Income Preceding Year   |
|----------------------------------------------------------------------------------|-------|---------------------------|----------------|-------------------------------|-------------------------|
| Enchanted Mountains Vet. Care PLLC, 100% Interest [OL]                           | SP    | \$1,000,001 - \$5,000,000 | Flow Through   | \$100,001 - \$1,000,000       | \$100,001 - \$1,000,000 |
| LOCATION: NY, NY, US                                                             |       |                           |                |                               |                         |
| DESCRIPTION: Flow through income from a sub chapter S corporation.               |       |                           |                |                               |                         |
| 401K ⇒<br>American Funds - SMALLCAP World Fund Inc Class R-2 Shares (RSLBX) [MF] | SP    | \$1,001 - \$15,000        | Tax-Deferred   |                               |                         |
| 401K ⇒<br>American Funds - The New Economy Fund Class R-2 Shares (RNGBX) [MF]    | SP    | \$15,001 - \$50,000       | Tax-Deferred   |                               |                         |
| 401K ⇒<br>American Funds Global Balanced Fd Cl R-2 (RGBBX) [MF]                  | SP    | \$15,001 - \$50,000       | Tax-Deferred   |                               |                         |
| 401K ⇒<br>New Perspective Fund, Class R-2 Shares (RNPBX) [MF]                    | SP    | \$15,001 - \$50,000       | Tax-Deferred   |                               |                         |
| 401K ⇒<br>The Bond Fund of America, Class R-2 Shares                             | SP    | \$1,001 - \$15,000        | Tax-Deferred   |                               |                         |

| Asset                                                                                                | Owner | Value of Asset           | Income Type(s) | Income<br>Current Year<br>to Filing | Income<br>Preceding<br>Year |
|------------------------------------------------------------------------------------------------------|-------|--------------------------|----------------|-------------------------------------|-----------------------------|
| (RFBFX) [MF]                                                                                         |       |                          |                |                                     |                             |
| 401K ⇒<br>The Growth Fund of America Class R-2 Shares<br>(RGABX) [MF]                                | SP    | \$50,001 -<br>\$100,000  | Tax-Deferred   |                                     |                             |
| 401K ⇒<br>The Income Fund of America, Class R-2 Shares<br>(RIDBX) [MF]                               | SP    | \$15,001 - \$50,000      | Tax-Deferred   |                                     |                             |
| 529 ⇒<br>American Funds College 2039 Fund Class 529-A<br>(CDJAX) [MF]                                | SP    | \$15,001 - \$50,000      | None           |                                     |                             |
| 529 ⇒<br>American Funds College Fund 2036 Class 529-A<br>(CCFAX) [MF]                                | SP    | \$1,001 - \$15,000       | None           |                                     |                             |
| Annuity ⇒<br>RILA [OT]<br><br>DESCRIPTION: RILA Annuity in IRA                                       | SP    | \$250,001 -<br>\$500,000 | Tax-Deferred   |                                     |                             |
| Annuity ⇒ Annuity ⇒<br>RILA [OT]<br><br>DESCRIPTION: RILA annuity in IRA                             | SP    | \$50,001 -<br>\$100,000  | Tax-Deferred   |                                     |                             |
| Brokerage Account ⇒<br>AMCAP Fund, Class A Shares A (AMCPX) [MF]                                     | JT    | \$50,001 -<br>\$100,000  | Capital Gains  | \$2,501 -<br>\$5,000                | \$2,501 -<br>\$5,000        |
| Brokerage Account ⇒<br>American Balanced Fund, Class A Shs (ABALX) [MF]                              | JT    | \$50,001 -<br>\$100,000  | Capital Gains  | None                                | \$2,501 -<br>\$5,000        |
| Brokerage Account ⇒<br>American Fds, American High-Income Municipal<br>Bond Fd, Class A (AMHIX) [MF] | JT    | \$15,001 - \$50,000      | None           |                                     |                             |
| Brokerage Account ⇒<br>American Funds Global Insight Fund Class A<br>(AGVFX) [MF]                    | JT    | \$50,001 -<br>\$100,000  | None           |                                     |                             |
| Brokerage Account ⇒<br>American Funds Inflation Linked Bond Fund - Class<br>A (BFIAX) [MF]           | JT    | \$15,001 - \$50,000      | None           |                                     |                             |
| Brokerage Account ⇒                                                                                  | JT    | \$50,001 -               | Capital Gains  | \$201 - \$1,000                     | \$2,501 -                   |

| Asset                                                                                     | Owner | Value of Asset        | Income Type(s)           | Income Current Year to Filing | Income Preceding Year |
|-------------------------------------------------------------------------------------------|-------|-----------------------|--------------------------|-------------------------------|-----------------------|
| American Funds Investment Co of America A (AIVSX) [MF]                                    |       | \$100,000             |                          |                               | \$5,000               |
| Brokerage Account ⇒ American Funds U.S. Government Money Market Fund Class A (AFAXX) [MF] | JT    | \$1 - \$1,000         | Dividends                | \$201 - \$1,000               | None                  |
| Brokerage Account ⇒ American Mutual Fund Class A Shares (AMRMX) [MF]                      | JT    | \$50,001 - \$100,000  | Capital Gains            | None                          | \$1,001 - \$2,500     |
| Brokerage Account ⇒ Fundamental Investors, Class A Shares (ANCFX) [MF]                    | JT    | \$100,001 - \$250,000 | Capital Gains            | \$1,001 - \$2,500             | \$2,501 - \$5,000     |
| Brokerage Account ⇒ The Bond Fund of America, Class A Shares (ABNDX) [MF]                 | JT    | \$15,001 - \$50,000   | Dividends                | \$201 - \$1,000               | None                  |
| Brokerage Account ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]                | JT    | \$100,001 - \$250,000 | Capital Gains            | None                          | \$2,501 - \$5,000     |
| Brokerage Account ⇒ The Income Fund of America, Class A Shares (AMECX) [MF]               | JT    | \$1,001 - \$15,000    | Capital Gains, Dividends | \$201 - \$1,000               | \$1,001 - \$2,500     |
| Roth IRA ⇒ AMCAP Fund, Class A Shares A (AMCPX) [MF]                                      |       | \$1,001 - \$15,000    | None                     |                               |                       |
| Roth IRA ⇒ American Balanced Fund, Class A Shs (ABALX) [MF]                               |       | \$1,001 - \$15,000    | None                     |                               |                       |
| Roth IRA ⇒ American Funds Investment Co of America A (AIVSX) [MF]                         |       | \$1,001 - \$15,000    | None                     |                               |                       |
| Roth IRA ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]                         |       | \$1,001 - \$15,000    | None                     |                               |                       |
| Roth IRA ⇒ The Income Fund of America, Class A Shares (AMECX) [MF]                        |       | \$1,001 - \$15,000    | None                     |                               |                       |
| Roth IRA ⇒ Roth IRA ⇒                                                                     |       | \$1,001 - \$15,000    | None                     |                               |                       |

| Asset                                                                               | Owner | Value of Asset      | Income Type(s) | Income<br>Current Year<br>to Filing | Income<br>Preceding<br>Year |
|-------------------------------------------------------------------------------------|-------|---------------------|----------------|-------------------------------------|-----------------------------|
| AMCAP Fund, Class A Shares A (AMCPX) [MF]                                           |       |                     |                |                                     |                             |
| Roth IRA ⇒ Roth IRA ⇒<br>American Balanced Fund, Class A Shs (ABALX) [MF]           |       | \$1,001 - \$15,000  | None           |                                     |                             |
| Roth IRA ⇒ Roth IRA ⇒<br>American Funds Investment Co of America A<br>(AIVSX) [MF]  |       | \$1,001 - \$15,000  | None           |                                     |                             |
| Roth IRA ⇒ Roth IRA ⇒<br>The Growth Fund of America Class A Shares<br>(AGTHX) [MF]  |       | \$1,001 - \$15,000  | None           |                                     |                             |
| Roth IRA ⇒ Roth IRA ⇒<br>The Income Fund of America, Class A Shares<br>(AMECX) [MF] |       | \$1,001 - \$15,000  | None           |                                     |                             |
| Whole Life Insurance ⇒<br>Aaron WL [WU]                                             | SP    | \$1,001 - \$15,000  | None           |                                     |                             |
| Whole Life Insurance ⇒<br>James WL [WU]                                             | SP    | \$1 - \$1,000       | None           |                                     |                             |
| Whole Life Insurance ⇒<br>Whole life policy [WU]                                    | SP    | \$15,001 - \$50,000 | None           |                                     |                             |
| Whole Life Insurance ⇒<br>Whole life policy [WU]                                    | SP    | \$15,001 - \$50,000 | None           |                                     |                             |

\* 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<br>Current Year to<br>Filing | Amount<br>Preceding Year |
|-----------------------------------------|---------------|-------------------------------------|--------------------------|
| St. Bonaventure University              | Salary        | \$2,201.00                          | \$57,006.00              |
| Enchanted Mountain Veterinary Care PLLC | Spouse Salary | \$67,305.00                         | \$250,000.00             |

SCHEDULE D: LIABILITIES

| Owner | Creditor    | Date Incurred  | Type                    | Amount of Liability   |
|-------|-------------|----------------|-------------------------|-----------------------|
|       | NYSERDA     | May 2024       | Solar Panel Loan        | \$15,001 - \$50,000   |
| SP    | Wells Fargo | September 2021 | long-term business loan | \$250,001 - \$500,000 |

SCHEDULE E: POSITIONS

| Position            | Name of Organization       |
|---------------------|----------------------------|
| Board Chair         | Canticle Farm, Inc.        |
| Assistant Professor | St. Bonaventure University |

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
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| <ul style="list-style-type: none"><li>◦ 529 (Owner: SP)<br/>LOCATION: VA</li><li>◦ Brokerage Account (Owner: JT)</li><li>◦ Roth IRA<br/>DESCRIPTION: Owned by just myself. Roth IRA</li><li>◦ Whole Life Insurance (Owner: SP)<br/>LOCATION: Olean, NY, US</li><li>◦ 529 (Owner: SP)<br/>LOCATION: VA</li><li>◦ Whole Life Insurance (Owner: SP)<br/>LOCATION: Olean, NY, US</li><li>◦ Annuity ⇒ Annuity (Owner: SP)</li><li>◦ Annuity (Owner: SP)</li><li>◦ Roth IRA ⇒ Roth IRA<br/>DESCRIPTION: Wife's Roth IRA</li><li>◦ 401K (Owner: SP)</li></ul> |
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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:** Dr. Aaron Gies , 10/07/2026