



Filing ID #10083042

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2026
Filing Date: 10/16/2026
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
RTM Fisheries [OL] LOCATION: Mattapoisett, MA, US DESCRIPTION: Fishery consultant and charters		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	\$50,001 - \$100,000
US bank account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Walden Cape Cod Solar, 20% Interest [OL] LOCATION: New York, NY, US DESCRIPTION: solar energy company		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Morgan Stanley IRA 1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley IRA 1 ⇒ JPMorgan Nasdaq Equity Premium Income ETF (JEPQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley IRA 1 ⇒ Lord Abbett Ultra Short Bond Fund - Class I (LUBYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley IRA 1 ⇒ ProShares S&P 500 High Income ETF (ISPY) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley IRA 1 ⇒ State Street SPDR S&P 500 ETF Trust (SPY) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley IRA 1 ⇒ US bank account [BA]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA 2 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley IRA 2 ⇒ JPMorgan Nasdaq Equity Premium Income ETF (JEPQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley IRA 2 ⇒ Lord Abbett Ultra Short Bond Fund - Class I (LUBYX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley IRA 2 ⇒ ProShares S&P 500 High Income ETF (ISPY) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley IRA 2 ⇒ State Street Financial Select Sector SPDR ETF (XLF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA 2 ⇒ State Street Health Care Select Sector SPDR ETF (XLV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA 2 ⇒ State Street SPDR S&P 500 ETF Trust (SPY) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley IRA 2 ⇒ US bank account [BA]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley IRA 3 ⇒ JNL/MELLON S&P 500 INDEX [OT] DESCRIPTION: Variable Annuity		\$100,001 - \$250,000	Tax-Deferred		
Morgan Stanley IRA 3 ⇒ US bank account [BA]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley Roth IRA 1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA 1 ⇒ JPMorgan Nasdaq Equity Premium Income ETF (JEPQ) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA 1 ⇒ ProShares S&P 500 High Income ETF (ISPY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA 1 ⇒ State Street SPDR S&P 500 ETF Trust (SPY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA 1 ⇒ US bank account [BA]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA 2 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Roth IRA 2 ⇒ JPMorgan Nasdaq Equity Premium Income ETF (JEPQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Roth IRA 2 ⇒ Lord Abbett Ultra Short Bond Fund - Class I (LUBYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Roth IRA 2 ⇒ ProShares S&P 500 High Income ETF (ISPY) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Roth IRA 2 ⇒ State Street SPDR S&P 500 ETF Trust (SPY) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley Roth IRA 2 ⇒ US bank account [BA]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley SEP IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley SEP IRA ⇒ Citizens Financial Group, Inc. Common Stock (CFG) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley SEP IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Invesco QQQ Trust, Series 1 (QQQ) [EF]					
Morgan Stanley SEP IRA ⇒ JPMorgan Nasdaq Equity Premium Income ETF (JEPQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley SEP IRA ⇒ Lord Abbett Ultra Short Bond Fund - Class I (LUBYX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley SEP IRA ⇒ ProShares S&P 500 High Income ETF (ISPY) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley SEP IRA ⇒ State Street SPDR S&P 500 ETF Trust (SPY) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Morgan Stanley SEP IRA ⇒ US bank account [BA]		\$1,001 - \$15,000	Tax-Deferred		
Schwab Brokerage Account ⇒ Apple Inc. - Common Stock (AAPL) [ST]	JT	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
Schwab Brokerage Account ⇒ AT&T Inc. (T) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1 - \$200
Schwab Brokerage Account ⇒ Bank of America Corporation Common Stock (BAC) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Brokerage Account ⇒ Carrier Global Corporation Common Stock (CARR) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Brokerage Account ⇒ Charter Communications, Inc. - Class A Common Stock (CHTR) [ST]	JT	\$1,001 - \$15,000	None		
Schwab Brokerage Account ⇒ Citizens Financial Group, Inc. Common Stock (CFG) [ST]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Schwab Brokerage Account ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]	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 Brokerage Account ⇒ Dell Technologies Inc. Class C Common Stock (DELL) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Brokerage Account ⇒ Enphase Energy, Inc. - Common Stock (ENPH) [ST]	JT	\$50,001 - \$100,000	None		
Schwab Brokerage Account ⇒ GE Aerospace Common Stock (GE) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Brokerage Account ⇒ GE HealthCare Technologies Inc. - Common Stock (GEHC) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Brokerage Account ⇒ GE Vernova Inc. Common Stock (GEV) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Brokerage Account ⇒ Motorola Solutions, Inc. Common Stock (MSI) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Brokerage Account ⇒ NetApp, Inc. - Common Stock (NTAP) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1 - \$200
Schwab Brokerage Account ⇒ Nuveen Core Equity Fund A (TIIRX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1 - \$200
Schwab Brokerage Account ⇒ Otis Worldwide Corporation Common Stock (OTIS) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Schwab Brokerage Account ⇒ Parnassus Value Equity Fund Investor Shares (PARWX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Schwab Brokerage Account ⇒ Procter & Gamble Company (PG) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Schwab Brokerage Account ⇒ RTX Corporation Common Stock (RTX) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Brokerage Account ⇒ T-Mobile US, Inc. (TMUS) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Brokerage Account ⇒	JT	\$100,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
T. Rowe Price Global Technology Fd Inc (PRGTX) [MF]		\$250,000			
Schwab Brokerage Account ⇒ T. Rowe Price Group, Inc. - Common Stock (TROW) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Schwab Brokerage Account ⇒ T. Rowe Price Integrated U.S. Small-Cap Growth Equity Fund (PRDSX) [MF]	JT	\$15,001 - \$50,000	Capital Gains	None	\$1,001 - \$2,500
Schwab Brokerage Account ⇒ Templeton Growth Fd, Inc. Class A (TEPLX) [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Schwab Brokerage Account ⇒ Walt Disney Company (DIS) [ST]	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
Schwab Brokerage Account ⇒ Warner Bros. Discovery, Inc. - Series A Common Stock (WBD) [ST]	JT	\$1,001 - \$15,000	None		
Schwab Brokerage Account ⇒ Wells Fargo & Company Common Stock (WFC) [ST]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Schwab Brokerage Account ⇒ Westinghouse Air Brake Technologies Corporation Common Stock (WAB) [ST]	JT	\$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
Energy Auction House Inc.	Salary	\$11,800.00	\$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
Board Member	Mattapoisett Select Board
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
Solid State Marine, LLC (Bridgewater, MA, US)	consulting
Commonwealth of Massachusetts (Boston, MA, US)	boat charters
Energy Auction House Inc. (Sandwich, MA, US)	energy broker

SCHEDULE A INVESTMENT VEHICLE DETAILS

◦ Morgan Stanley Roth IRA 2 ◦ Morgan Stanley Roth IRA 1 ◦ Morgan Stanley SEP IRA ◦ Schwab Brokerage Account (Owner: JT) ◦ Morgan Stanley IRA 3 ◦ Morgan Stanley IRA 1 ◦ Morgan Stanley IRA 2
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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: Robert Tyler Macallister , 10/16/2026