



Filing ID #10054702

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Matt Cartwright
Status: Member
State/District: PA08

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 08/10/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
"Litigating Business and Commercial Tort Cases" published by Thomson Reuters [IP]		Undetermined	Royalties	\$1,001 - \$2,500	<input type="checkbox"/>
Archer Partners LLC ⇒ People's Security Checking Account [BA]		\$1 - \$1,000	None		<input type="checkbox"/>
Archer Partners LLC ⇒ Piper Archer III Single Prop aircraft [OL] LOCATION: Scranton, PA, US DESCRIPTION: Asset of Archer Partners LLC		\$100,001 - \$250,000	None		<input type="checkbox"/>
B.O.B. Digital Marketing Agency, LLC [OL] LOCATION: Scranton, PA, US DESCRIPTION: New asset acquired in 2021, and filer is voluntarily reporting it. The value is below \$1000 and there were no reportable transactions.	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Blackrock Mid Cap Growth A [MF] DESCRIPTION: Value decrease. No reportable transactions.	JT	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Columbia Acorn International Fund [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Elfun Trusts Funds [MF]		\$250,001 - \$500,000	Capital Gains, Interest	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Hague NY Property Trust [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Hague, NY, US					
Merrill Edge Cash/Money Account [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Met Life Whole Life Policy [WU]		\$15,001 - \$50,000	Dividends, Interest	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB Flexfee Large Cap [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB High Income Adv [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB Large-Cap Growth Adv [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB Select US Long/Short [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ American Balanced F2 [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ American WA Mutual [MF]	SP	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Angel Oak Multi Strat Inc I [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Baron Growth Institutional [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Blackrock Income Institutional [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Blackrock Midcap Growth [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Brandywine Global High Yield [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley Investment Account ⇒ Calamos Phineus Long/Short I [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Catalyst Millburn HGD Strat I [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Cohen & Steers Low Duration [MF]	SP	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Balanced Inst [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Dividend Income [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Small Cap Growth [MF]	SP	None	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Strategic Muni Inc [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Credit Suisse Strategic Income [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Eaton Vance Advantage Floating Rate [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Fidelity Advantage Growth Opportunities [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ First Eagle Global [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Franklin Dynatech Advisor [MF]	SP	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Franklin Hi Yield Tx Fr Adv [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Franklin Income Adv [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒	SP	\$1,001 - \$15,000	Capital Gains,	\$201 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Gabelli Utilities I [MF]			Dividends	\$1,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Gateway Fund Y [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Goldman Sachs Dynamic Muni [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Goldman Sachs High Yield Muni [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Goldman Sachs Inc Builder [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Guggenheim Floating Rt Straight I [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Guggenheim Macro Opportunities [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Hartford Balanced Inc [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Hartford Schr US Mdcp Opp I [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Ishares Core S&P Small Cap E [EF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Janus Henderson Balanced [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ JP Morgan Hedged Equity [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ JPMorgan Equity Premium INCO [EF]	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ JPMorgan Income Builder [MF]	SP	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Legg Mason Clearbridge [MF]	SP	None	Dividends	None	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley Investment Account ⇒ Locorr Macro Strategies I [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Lord Abbett Short Duration [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Massmutual Global Credit [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Morgan Stanley Bank Account [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Nuance MidCap Value Institutional [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Pimco Income 12 [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Principal Blue Chip [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ T Rowe Price All Cap Opportunity Fund [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ T Rowe Price Global Stock Fund [MF]	SP	None	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Vanguard Health Care ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Victory Floating Rate [MF]	SP	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Victory Incore Investment Grade [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Virtus KAR Small Cap [MF]	SP	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Voya Strategic Income Oppportunity [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ WCM Focused International Growth [MF]	SP	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley Investment Account ⇒ WCM International Small Cap Growth [MF]	SP	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Wisdomtree Trust US Quality [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley Investment Account ⇒ Wisdomtree US Midcap [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Munley Financing [OL] LOCATION: Scranton, PA, US DESCRIPTION: Ownership interest	SP	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Munley Law PC [OL] LOCATION: Scranton, PA, US DESCRIPTION: Ownership interest		\$50,001 - \$100,000	None		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corp Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corp Bond [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Treasury Bond [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 1-3 Treasury Bond [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 3-7 Year Treasury Bond [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 3-7 Year Treasury Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Munley Law Profit Sharing Plan ⇒ ISHares 7-10 Year Treasury Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares Broad USD Invt Grade [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares Broad USD Invt Grade [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares Core MSCI EAFE [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares Core MSCI EAFE [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares Core MSCI Emerging Markets [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares Core MSCI Emerging Markets [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares IBOXX Invt Grade Corp Bond [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares IBOXX Invt Grade Corp Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares JPM USD Emerging Markets Bond [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares JPM USD Emerging Markets Bond [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares Russell 1000 Growth [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares Russell 1000 Growth [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares Russell 1000 Value [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ ISHares Russell 1000 Value [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell 2000 [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell MidCap [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares Russell MidCap [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Liquid Assets Govt Fund [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Liquid Assets Govt Fund [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corp Bond [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corp Bond [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ US Treasury Inflation Protected Note 7/15/2022 [EF]		None	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ US Treasury Note 2/15/2023 [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Nantucket Holding Company [RP]	JT	\$50,001 -	Rent	\$15,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$100,000		\$50,000	<input type="checkbox"/>
LOCATION: Scranton, PA, US DESCRIPTION: Holding company for 231 and 241 Penn Ave					
Penn Avenue Properties [RP]	SP	\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Scranton, PA, US					
People's Security Bank Accounts [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
PNC Bank Accounts [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
TD Ameritrade Account ⇒ Bristol-Myers Squibb Company (BMY) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TD Ameritrade Account ⇒ General Electric Company (GE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TD Ameritrade Account ⇒ TD Ameritrade Sweep Account [BA]	JT	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
TD Ameritrade Account ⇒ Westinghouse Air Brake Technologies Corporation (WAB) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
UBS Investment Account ⇒ Ishares Core MSCI EAFE [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
UBS Investment Account ⇒ Pimco Enhanced Short Maturation [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
UBS Investment Account ⇒ UBS Sweep Account [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
UBS Investment Account ⇒ Vanguard Short Term Corporate Bond [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
UBS Investment Account ⇒ Vanguard Total Stock Market [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Investment Account ⇒ Cash Reserve Federal Money Market Fund [MF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Emerging Markets Stock Index [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Real Estate Index (REIT) [MF]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Treasury Money Market [MF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard Investment Account ⇒ Wellesley Income Fund [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Wayne Bank Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

* Asset class 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Columbia Acorn International Fund [MF]		12/27/2022	P	\$1,001 - \$15,000	
Elfun Trust Funds [MF]		12/27/2022	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ AB High Income ADV [EF]	SP	06/7/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ AB Large Cap GRW ADV [EF]	SP	07/26/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ AB Large-Cap Grw ADV [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ AB Select US Long-Short [EF]	SP	06/7/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley Investment Account ⇒ American Balanced F2 [EF]	SP	06/7/2022	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ American WA Mutual F2 [EF]	SP	06/7/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Angel Oak Multistrat [EF]	SP	10/12/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Baron Growth Instl [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Blackrock Income [EF]	SP	01/24/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Blackrock Mid Cap [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Brandywine Global [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Calamos Phineus [EF]	SP	06/7/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Catalyst Millburn HGD [EF]	SP	06/7/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Cohen & Steers Low [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Balanced Inst [EF]	SP	06/7/2022	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ Columbia Dividend Income [EF]	SP	01/24/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Small Cap [EF]	SP	01/24/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Columbia Strategic Income [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒	SP	06/7/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Credut Suisse Strategic Income [EF]			(partial)		<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Fidelity Adv Grw [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ First Eagle Global [EF]	SP	06/7/2022	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ Franklin Dynatech [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Franklin Hi Yield [EF]	SP	06/7/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Franklin Income Adv [EF]	SP	06/7/2022	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ Gabelli Utilities [EF]	SP	10/12/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Gateway Fund [EF]	SP	10/12/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Goldman Sachs Dynamic [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Goldman Sachs HI Yld [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Goldman Sachs Income Builder [EF]	SP	06/7/2022	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ Guggenheim Floating RT Strat [EF]	SP	06/7/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Guggenheim Macro [EF]	SP	10/12/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Hartford Balanced Inc [EF]	SP	06/7/2022	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ Hartford Schr US MDCP [EF]	SP	07/26/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley Investment Account ⇒ Ishares Core S&P Small Cap ETF [EF]	SP	07/26/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Janus Henderson [EF]	SP	06/7/2022	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ JP Morgan Hedged Equity [EF]	SP	06/7/2022	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ JP Morgan Income Builder [EF]	SP	06/7/2022	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ JPMorgan Equity Premium [EF]	SP	06/7/2022	P	\$15,001 - \$50,000	
Morgan Stanley Investment Account ⇒ Legg Mason Clearbridge [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Locorr Macro [EF]	SP	10/12/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Lord Abbett Sht [EF]	SP	01/24/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Massmutual GLB [EF]	SP	01/24/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Niance Mid Cap [EF]	SP	01/24/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Pimco Income [EF]	SP	06/7/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Principal Blue Chip [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ T Rowe Price All Cap [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ T Rowe Price Global [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley Investment Account ⇒ Vanguard Healthcare ETF [EF]	SP	10/12/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Victory Float [EF]	SP	06/7/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Victory Incore INV [EF]	SP	06/7/2022	P	\$1,001 - \$15,000	
Morgan Stanley Investment Account ⇒ Virtus Kar SM-Cap [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ WCM Focused Intl [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ WCM Intl Sm Cap [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Wisdomtree Trust US Quality [EF]	SP	06/7/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Morgan Stanley Investment Account ⇒ Wisdomtree US Midcap [EF]	SP	06/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Ishares 0-5 Year High [EF]	SP	06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corporate Bond [EF]		12/16/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ iShares 0-5 Year High Yield Corporate Bond [EF]		06/1/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Ishares 1-3 Year Treas Bond [EF]		07/18/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares 1-3 Year Treas Bond [EF]		03/4/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares 1-3 Year Treas Bond [EF]	SP	06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒	SP	07/26/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ishares 1-3 Yr Treas Bond [EF]					
Munley Law Profit Sharing Plan ⇒ Ishares 20+ Year Treas Bond [EF]		06/1/2023	P	\$50,001 - \$100,000	
Munley Law Profit Sharing Plan ⇒ Ishares 20+ Year Treas Bond [EF]	SP	12/16/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares 20+ Year Treas Bond [EF]	SP	06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares 3-7 Year Treas Bond [EF]		06/1/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Ishares 3-7 Year Treas Bond [EF]	SP	12/16/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Ishares 3-7 Year Treas Bond [EF]		07/18/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares 7-10 Year Treasury Bond [EF]		06/1/2022	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ Ishares 7-10 Year Treasury Bond [EF]		03/4/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares Broad USD Invt Grade [EF]		12/16/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Ishares Broad USD Invt Grade [EF]	SP	12/16/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares Core MSCI EAFE [EF]		06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares Core MSCI EAFE [EF]	SP	12/16/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares Core MSCI Emerging Markets [EF]		06/1/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Ishares Core MSCI Emerging Markets [EF]	SP	12/16/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Munley Law Profit Sharing Plan ⇒ Ishares Core MSCI Emerging Markets [EF]	SP	06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares IBoxx \$ INVT [EF]		07/26/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Ishares IBoxx \$ INVT [EF]		06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares JP Morgan USD [EF]		12/16/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Ishares JP Morgan USD [EF]		06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares JP Morgan USD [EF]	SP	12/16/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares JP Morgan USD [EF]	SP	06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares Russell 1000 Growth [EF]		06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares Russell 1000 Growth [EF]	SP	07/26/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares Russell 1000 Growth [EF]	SP	06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares Russell 1000 Value [EF]		12/16/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Ishares Russell 1000 Value [EF]		06/1/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Ishares Russell 1000 Value [EF]	SP	07/26/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares Russell 2000 [EF]	SP	06/1/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Munley Law Profit Sharing Plan ⇒ Ishares Russell Midcap [EF]	SP	12/16/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Ishares Russell Midcap [EF]	SP	06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term [EF]	SP	03/4/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term [EF]		07/18/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term [EF]	SP	06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]		06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]	SP	03/4/2022	P	\$15,001 - \$50,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]		06/1/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]	SP	06/1/2022	P	\$1,001 - \$15,000	
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]	SP	03/4/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ 500 Index Fund [EF]	JT	03/23/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ 500 Index Fund [EF]	JT	06/28/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ 500 Index Fund [EF]	JT	09/27/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ 500 Index Fund [EF]	JT	12/19/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒	JT	06/17/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Emerging Mkts Stk Index [EF]					
Vanguard Investment Account ⇒ Emerging Mkts Stk Index [EF]	JT	09/16/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Emerging Mkts Stk Index [EF]	JT	12/16/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Value Index Fund [EF]	JT	03/22/2023	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Value Index Fund [EF]	JT	06/22/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Value Index Fund [EF]	JT	09/22/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Value Index Fund [EF]	JT	12/21/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [EF]	JT	03/22/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [EF]	JT	06/17/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [EF]	JT	09/16/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [EF]	JT	12/19/2022	P	\$1,001 - \$15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [EF]	JT	12/19/2022	P	\$1,001 - \$15,000	

* Asset class 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
Munley Law	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	People's Security Bank	2021 periodic	Law firm line of credit	\$1,000,001 - \$5,000,000
JT	People's Security Bank	March 2008	Mortgage on office property	\$250,001 - \$500,000
JT	People's Security Bank	1998	Mortgage on personal residence	\$15,001 - \$50,000
JT	People's Security Bank	September 2020	Home Equity loan	\$15,001 - \$50,000
JT	American Express	December 2021	Revolving credit card	\$15,001 - \$50,000
	People's Security Bank	December 2017	Mortgage on 231 Penn Ave property	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee (uncompensated)	Hague Personal Residence Trust
Officer (uncompensated)	Archer Partners LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2012	Munley Law Firm and filer	Continued participation in profit sharing plan (no new contributions, investment income reinvestment only)

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Archer Partners LLC
LOCATION: US
- Morgan Stanley Investment Account (Owner: SP)
LOCATION: US
- Munley Law Profit Sharing Plan
- Munley Law Profit Sharing Plan (Owner: SP)
- TD Ameritrade Account (Owner: JT)
LOCATION: US
- UBS Investment Account (Owner: JT)
LOCATION: US
- Vanguard Investment Account (Owner: JT)
LOCATION: US

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

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: Hon. Matt Cartwright , 08/10/2023