Filing ID #10040351

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: 2020
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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	☐
227 Penn Avenue [RP] Location: Scranton, PA, US	SP	$100,001 - $250,000	Rent	$15,001 - $50,000	☐
Archer Partners LLC ⇒ People's Security Checking Account [BA]		$1 - $1,000	None		☐
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		☐
Blackrock Mid Cap Growth A [MF]	JT	$50,001 - $100,000	None		☐
Columbia Acorn International Fund [MF]		$250,001 - $500,000	Capital Gains, Dividends	$15,001 - $50,000	☑
Elfun Trusts Funds [MF]		$250,001 - $500,000	Capital Gains, Interest	$15,001 - $50,000	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Hague NY Property Trust [RP] LOCATION: Hague, NY, US		$250,001 - $500,000	Rent	$5,001 - $15,000	☐
Merrill Edge Cash/Money Account [BA]		$15,001 - $50,000	None		☐
Met Life Whole Life Policy [WU]		$15,001 - $50,000	Dividends, Interest	$1,001 - $2,500	☐
Morgan Stanley Investment Account ⇒ AB Flexfee Large Cap [MF]	SP	$1,001 - $15,000	Dividends	None	☑
Morgan Stanley Investment Account ⇒ AB Select US Long/Short [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Aquila Three Peaks Opportunity Growth [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Baron Growth Institutional [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Blackrock Income Institutional [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Calvert Small Cap [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Columbia Dividend Income1 [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Columbia Floating Rate [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Columbia Strategic Muni Inc [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Credit Suisse Strategic Income [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Eaton Vance Advantage Floating Rate [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒	SP	$1,001 - $15,000	Dividends	$1 - $200	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity Advisor Growth Opportunities [MF]					
Morgan Stanley Investment Account ⇒ Goldman Sachs Dynamic Muni [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Invesco Conservative Inc Institutional [MF]	SP	$50,001 - $100,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Janus Henderson Balanced [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ JP Morgan Global Bond Opportunity [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ JP Morgan Hedged Equity [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Lazard Global Listed [MF]	SP	$1,001 - $15,000	Dividends	None	☑
Morgan Stanley Investment Account ⇒ Legg Mason Clearbridge [MF]	SP	$1,001 - $15,000	Dividends	None	☑
Morgan Stanley Investment Account ⇒ Loomis Sayles Global Allocation [MF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	☑
Morgan Stanley Investment Account ⇒ Lord Abbett Bond Debenture [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Lord Abbett Short Duration [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Morgan Stanley Bank Account [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	☐
Morgan Stanley Investment Account ⇒ Morgan Stanley Global Fixed Income [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Morgan Stanley Investment Account ⇒ Morgan Stanley Mortgage Securities Trust [MF]	SP	$1,001 - $15,000	Dividends	None	☑
Morgan Stanley Investment Account ⇒ MSIF Ultra-Short Income [MF]	SP	$50,001 - $100,000	Dividends	$1 - $200	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Morgan Stanley Investment Account ⇒ Natixis US Opportunity [MF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	✓
Morgan Stanley Investment Account ⇒ Nuance MidCap Value Institutional [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ Pacific Floating Rate [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ Performance Trust Strategic Bond [MF]	SP	$1,001 - $15,000	Dividends	None	✓
Morgan Stanley Investment Account ⇒ PGIM Absolute Return Bond [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ PGIM Short Duration High Yield [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ Pimco International Bond USD Hedged [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ Pioneer Multi Asset Ultra-Short [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ Principal Blue Chip [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ Principal MidCap [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ Putnam Diversified [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ Putnam Ultra Short Duration [MF]	SP	$50,001 - $100,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ Semper MBS Total Return [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ Victory Incore Investment Grade [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Morgan Stanley Investment Account ⇒ Virtus KAR International Small Cap [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Morgan Stanley Investment Account ⇒ Virtus KAR Small Cap Growth [MF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	✓
Morgan Stanley Investment Account ⇒ Voya Strategic Income Oppportunity [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
Munley Financing [OL] LOCATION: Scranton, PA, US DESCRIPTION: Ownership interest	SP	$100,001 - $250,000	Interest	$2,501 - $5,000	
Munley Law PC [OL] LOCATION: Scranton, PA, US DESCRIPTION: Ownership interest		$50,001 - $100,000	None		
Munley Law Profit Sharing Plan ⇒ IShares 0-5 Year High Yield Corp Bond [EF]		$50,001 - $100,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares 0-5 Year High Yield Corp Bond [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Munley Law Profit Sharing Plan ⇒ IShares 1-3 Treasury Bond [EF]	SP	$50,001 - $100,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares 1-3 Treasury Bond [EF]		$100,001 - $250,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond [EF]		$15,001 - $50,000	Tax-Deferred		
Munley Law Profit Sharing Plan ⇒ iShares 20+ Year Treasury Bond [EF]	SP	$50,001 - $100,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares 3-7 Year Treasury Bond [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Munley Law Profit Sharing Plan ⇒ IShares 3-7 Year Treasury Bond [EF]		$100,001 - $250,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares 7-10 Year Treasury Bond [EF]		$50,001 - $100,000	Tax-Deferred		
Munley Law Profit Sharing Plan ⇒ IShares Broad USD Invt Grade [EF]		$100,001 - $250,000	Tax-Deferred		✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Munley Law Profit Sharing Plan ⇒ IShares Broad USD Invt Grade [EF]	SP	$50,001 - $100,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI EAFE [EF]		$15,001 - $50,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI EAFE [EF]	SP	$100,001 - $250,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI Emerging Markets [EF]	SP	$50,001 - $100,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI Emerging Markets [EF]		$1,001 - $15,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares IBOXX Invt Grade Corp Bond [EF]		$100,001 - $250,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares IBOXX Invt Grade Corp Bond [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Munley Law Profit Sharing Plan ⇒ IShares JPM USD Emerging Markets Bond [EF]		$50,001 - $100,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares JPM USD Emerging Markets Bond [EF]	SP	$100,001 - $250,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Growth [EF]	SP	$100,001 - $250,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Growth [EF]		$50,001 - $100,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Value [EF]		$15,001 - $50,000	Tax-Deferred		✓
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Value [EF]	SP	$100,001 - $250,000	Tax-Deferred		
Munley Law Profit Sharing Plan ⇒ IShares Russell 2000 [EF]	SP	$50,001 - $100,000	Tax-Deferred		
Munley Law Profit Sharing Plan ⇒ IShares Russell 2000 [EF]		$1,001 - $15,000	Tax-Deferred		✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Munley Law Profit Sharing Plan ⇒ IShares Russell MidCap [EF]		$15,001 - $50,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ IShares Russell MidCap [EF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ Liquid Assets Govt Fund [EF]	SP	$50,001 - $100,000	Tax-Deferred		☐
Munley Law Profit Sharing Plan ⇒ Liquid Assets Govt Fund [EF]		$15,001 - $50,000	Tax-Deferred		☐
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corp Bond [EF]		$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corp Bond [EF]	SP	$100,001 - $250,000	Tax-Deferred		☐
Munley Law Profit Sharing Plan ⇒ US Treasury Inflation Protected Note 7/15/2022 [EF]		$15,001 - $50,000	Tax-Deferred		☐
Munley Law Profit Sharing Plan ⇒ US Treasury Note 2/15/2023 [EF]		$15,001 - $50,000	Tax-Deferred		☐
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]		$15,001 - $50,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]	SP	$100,001 - $250,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]		$1,001 - $15,000	Tax-Deferred		☑
Nantucket Holding Company [RP] Location: Nantucket, MA, US	JT	$50,001 - $100,000	Rent	$15,001 - $50,000	☐
People's Security Bank Accounts [BA]		$250,001 - $500,000	Interest	$1,001 - $2,500	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
PNC Bank Accounts [BA]		$1,001 - $15,000	None		☐
TD Ameritrade Account ⇒ Bristol-Myers Squibb Company (BMY) [ST]	JT	$1,001 - $15,000	Dividends	$1 - $200	☐
TD Ameritrade Account ⇒ General Electric Company (GE) [ST]	JT	$1,001 - $15,000	Dividends	$1 - $200	☐
TD Ameritrade Account ⇒ TD Ameritrade Sweep Account [BA]	JT	$1,001 - $15,000	Interest	None	☐
TD Ameritrade Account ⇒ Westinghouse Air Brake Technologies Corporation (WAB) [ST]	JT	$1 - $1,000	Dividends	$1 - $200	☐
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	$500,001 - $1,000,000	Dividends	$5,001 - $15,000	☑
Vanguard Investment Account ⇒ Cash Reserve Federal Money Market Fund [MF]	JT	$250,001 - $500,000	Interest	$1,001 - $2,500	☑
Vanguard Investment Account ⇒ Emerging Markets Stock Index [MF]	JT	$100,001 - $250,000	Dividends	$2,501 - $5,000	☑
Vanguard Investment Account ⇒ Real Estate Index (REIT) [MF]	JT	$50,001 - $100,000	Dividends	$2,501 - $5,000	☑
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	$250,001 - $500,000	Dividends	$5,001 - $15,000	☑
Vanguard Investment Account ⇒ Vanguard Growth Index Fund [MF]	JT	$250,001 - $500,000	Dividends	$2,501 - $5,000	☐
Vanguard Investment Account ⇒ Wellesley Income Fund [MF]	JT	$100,001 - $250,000	Capital Gains, Dividends	$5,001 - $15,000	☑
Wayne Bank Accounts [BA]		$100,001 - $250,000	Interest	$1 - $200	☐

* 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]		06/10/2020	P	$1,001 - $15,000	
Columbia Acorn International Fund [MF]		12/17/2020	P	$15,001 - $50,000	
Elfun Trusts Funds [MF]		12/28/2020	P	$15,001 - $50,000	
Morgan Stanley Investment Account ⇒ AB Flexfee Large Cap [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ AB Select US Long/Short [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ AB Select US Long/Short [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Aquila Three Peaks Opportunity Growth [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Aquila Three Peaks Opportunity Growth [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Baron Growth Institutional [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Blackrock Income Institutional [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Blackrock Income Institutional [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Calvert Small Cap [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Columbia Dividend Income [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Columbia Dividend Income [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Columbia Floating Rate [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒	SP	12/15/2020	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Columbia Strategic Muni Inc [MF]					
Morgan Stanley Investment Account ⇒ Columbia Strategic Muni Inc [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Credit Suisse Strategic Income [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Credit Suisse Strategic Income [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Eaton Vance Floating Rate Fund [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Fidelity Advisor Growth Opportunities [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Goldman Sachs Dynamic Muni [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Goldman Sachs Dynamic Muni [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Invesco Conservative Inc Institutional [MF]	SP	10/22/2020	P	$50,001 - $100,000	
Morgan Stanley Investment Account ⇒ Janus Henderson Balanced [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Janus Henderson Balanced [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ JP Morgan Global Bond Opportunity [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ JP Morgan Hedged Equity [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ JP Morgan Hedged Equity [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Lazard Global Listed [MF]	SP	10/21/2020	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Morgan Stanley Investment Account ⇒ Legg Mason Clearbridge [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Legg Mason Clearbridge [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Loomis Sayles Global Allocation [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Loomis Sayles Global Allocation [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Lord Abbett Bond Debenture [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Lord Abbett Bond Debenture [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Lord Abbett Short Duration [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Lord Abbett Short Duration [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Morgan Stanley Global Fixed Income [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Morgan Stanley Mortgage Securities Trust [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ MSIF Ultra-Short Income [MF]	SP	10/22/2020	P	$50,001 - $100,000	
Morgan Stanley Investment Account ⇒ Natixis US Opportunity [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Natixis US Opportunity [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Nuance MidCap Value Institutional [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Nuance MidCap Value Institutional [MF]	SP	10/21/2020	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Morgan Stanley Investment Account ⇒ Pacific Floating Rate [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Pacific Floating Rate [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Performance Trust Strategic Bond [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ PGIM Absolute Return Bond [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ PGIM Short Duration High Yield [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ PGIM Short Duration High Yield [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Pimco International Bond USD Hedged [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Pimco International Bond USD Hedged [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Pioneer Multi Asset Ultra-Short [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Principal Blue Chip [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Principal Blue Chip [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Principal MidCap [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Principal MidCap [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Putnam Diversified [MF]	SP	12/15/2020	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Morgan Stanley Investment Account ⇒ Putnam Diversified [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Putnam Ultra Short Duration [MF]	SP	10/22/2020	P	$50,001 - $100,000	
Morgan Stanley Investment Account ⇒ Semper MBS Total Return [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Victory Incore Investment Grade [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Virtus KAR International Small Cap [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Virtus KAR Small Cap Growth [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Voya Strategic Income Oppportunity [MF]	SP	12/15/2020	P	$1,001 - $15,000	
Morgan Stanley Investment Account ⇒ Voya Strategic Income Oppportunity [MF]	SP	10/21/2020	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ Invesco Emerging Markets Sovereign Debt [EF]		01/27/2020	S	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ IShares 0-5 Year High Yield Corp Bond [EF]		01/27/2020	S (partial)	$100,001 - $250,000	☐
Munley Law Profit Sharing Plan ⇒ IShares 0-5 Year High Yield Corp Bond [EF]		09/18/2020	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ IShares 1-3 Treasury Bond [EF]		01/27/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ IShares 1-3 Treasury Bond [EF]	SP	09/18/2020	P	$50,001 - $100,000	
Munley Law Profit Sharing Plan ⇒ IShares 3-7 Year Treasury Bond [EF]		01/27/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ IShares 3-7 Year Treasury Bond [EF]	SP	09/18/2020	P	$50,001 - $100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Munley Law Profit Sharing Plan ⇒ IShares Broad USD Invt Grade [EF]		01/27/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ IShares Broad USD Invt Grade [EF]	SP	09/18/2020	P	$50,001 - $100,000	
Munley Law Profit Sharing Plan ⇒ IShares Broad USD Invt Grade [MF]	SP	09/18/2020	P	$50,001 - $100,000	
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI EAFE [EF]		09/18/2020	S (partial)	$1,001 - $15,000	☐
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI EAFE [EF]		01/27/2020	S (partial)	$50,001 - $100,000	☐
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI EAFE [EF]	SP	09/18/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI Emerging Markets [EF]		01/27/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ IShares Core MSCI Emerging Markets [EF]	SP	09/18/2020	S (partial)	$50,001 - $100,000	☐
Munley Law Profit Sharing Plan ⇒ IShares IBOXX Invt Grade Corp Bond [EF]		09/18/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ IShares IBOXX Invt Grade Corp Bond [EF]		01/27/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ IShares JPM USD Emerging Markets Bond [EF]		09/18/2020	P	$15,001 - $50,000	
Munley Law Profit Sharing Plan ⇒ IShares JPM USD Emerging Markets Bond [EF]	SP	09/18/2020	P	$50,001 - $100,000	
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Growth [EF]		01/27/2020	S (partial)	$50,001 - $100,000	☐
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Growth [EF]		09/18/2020	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒	SP	09/18/2020	S	$15,001 - $50,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
IShares Russell 1000 Growth [EF]			(partial)		
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Value [EF]		01/27/2020	S (partial)	$50,001 - $100,000	☐
Munley Law Profit Sharing Plan ⇒ IShares Russell 1000 Value [EF]		09/18/2020	P	$1,001 - $15,000	
Munley Law Profit Sharing Plan ⇒ IShares Russell 2000 [EF]		01/27/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ IShares Russell MidCap [EF]		01/27/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ IShares Russell MidCap [EF]	SP	09/18/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ SPDR Portfolio Short Term Corp Bond [EF]		01/27/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]		01/27/2020	S (partial)	$50,001 - $100,000	☐
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE All World Ex-US [EF]	SP	09/18/2020	S (partial)	$50,001 - $100,000	☐
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]		01/27/2020	S (partial)	$15,001 - $50,000	☐
Munley Law Profit Sharing Plan ⇒ Vanguard FTSE Emerging Markets [EF]	SP	09/18/2020	S (partial)	$50,001 - $100,000	☐
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	03/16/2020	P	$250,001 - $500,000	
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	06/26/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	09/28/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ 500 Index Fund [MF]	JT	12/21/2020	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Vanguard Investment Account ⇒ Cash Reserve Federal Money Market Fund [MF]	JT	03/16/2020	S (partial)	$250,001 - $500,000	☐
Vanguard Investment Account ⇒ Emerging Markets Stock Index [MF]	JT	09/18/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ Emerging Markets Stock Index [MF]	JT	12/18/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ Real Estate Index (REIT) [MF]	JT	12/23/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	03/25/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	06/24/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	09/24/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ Value Index Fund [MF]	JT	12/23/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [MF]	JT	03/20/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [MF]	JT	06/26/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [MF]	JT	09/28/2020	P	$1,001 - $15,000	
Vanguard Investment Account ⇒ Wellesley Income Fund [MF]	JT	12/21/2020	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	2020 periodic	Law firm line of credit	$1,000,001 - $5,000,000
JT	People's Security Bank	October 2005	Mortgage on office property	$250,001 - $500,000
JT	American Express	December 2020	Revolving credit card	$15,001 - $50,000
JT	People's Security Bank	1998	Mortgage on personal residence	$50,001 - $100,000
JT	People's Security Bank	September 2020	Home Equity loan	$50,001 - $100,000

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
- 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 , 08/13/2021