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Annual Report for Calendar 2024

The Honorable Martin Heinrich (Heinrich, Martin)

Filed 08/13/2025 @ 11:52 AM

Print Report

The following statements were checked before filing:

- I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.
- I *omitted* assets because they meet the three-part test for exemption.

Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance? **No**

Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Spouse	Salary	Meow Wolf, Inc. Santa Fe, NM	> \$1,000	n/a

Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

	Asset	Asset Type	Owner	Value	Income Type	Income
1	Scholar's Edge 529 <i>Institution: The Education Trust Board of</i>	Education Savings Plans	Spouse			

	Institution: THE EDUCATION TRUST BOARD OF New Mexico Asset	Plan 529 College Savings Plan Type	Owner	Value	Income Type	Income
1.1	Scholar's Edge Today Portfolio A	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	None,	None (or less than \$201)
1.2	Scholar's Edge Conservative Portfolio A	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
2	Congressional Federal Credit Union (Washington, DC) Type: Checking, Savings,	Bank Deposit	Self	\$15,001 - \$50,000	Interest,	None (or less than \$201)
3	Congressional Federal Credit Union (Washington, DC) Type: Checking, Savings,	Bank Deposit	Spouse	\$1,001 - \$15,000	Interest,	None (or less than \$201)
4	NUSENDA Credit Union (Albuquerque, NM) Type: Checking, Savings,	Bank Deposit	Child	\$1,001 - \$15,000	None,	None (or less than \$201)
5	NUSENDA Credit Union (Albuquerque, NM) Type: Checking, Savings,	Bank Deposit	Child	\$1,001 - \$15,000	None,	None (or less than \$201)
6	Martin Heinrich IRA	Retirement Plans IRA	Self			
6.1	FNIAX-Fidelity Advisor New Insights A (NASDAQ)	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	None,	None (or less than \$201)
6.2	FSTAX-Fidelity Advisor Strategic Income A (NASDAQ)	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	None,	None (or less than \$201)
6.3	FSCDX-Fidelity Advisor Small Cap A (NASDAQ)	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
6.4	FIIAX-Fidelity Advisor Mid Cap II A (NASDAQ)	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
6.5	FDAGX-Fidelity Advisor Consumer Staples A (NASDAQ)	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	None,	None (or less than \$201)
7	Public Employees Retirement Association of New Mexico	Retirement Plans Defined Benefit Pension Plan	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
8	Public Employees Retirement Association of New Mexico	Retirement Plans Defined Benefit Pension Plan	Spouse	\$100,001 - \$250,000	None,	None (or less than \$201)
9	Empower Retirement	Retirement Plans Defined Contribution Pension Plan	Spouse			

9.1	FITLX - Fidelity U.S. Sustainability Index Fund	Mutual Funds	Spouse	\$100,001 - \$250,000	None	None (or less than \$201)
	Asset	Mutual Fund	Owner	Value	Income Type	Income

Part 4a. Periodic Transaction Report Summary

In this section, electronically filed periodic transaction report (PTR) transactions are displayed for you.

Part 4b. Transactions

Did you, your spouse, or dependent child buy, sell, or exchange an asset where the transaction exceeded \$1,000 and was not reported on Part 4a? **Yes**

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
1	Self	FNIAX	Fidelity Advisor New Insights Class A	Purchase	12/06/2024	\$1,001 - \$15,000	n/a
2	Spouse	--	Scholar's Edge Today Portfolio A	Sale (Partial)	03/11/2024	\$1,001 - \$15,000	n/a
3	Self	FSTAX	Fidelity Advisor Series II Fidelity Advisor Stra	Sale (Partial)	03/25/2024	\$1,001 - \$15,000	n/a
4	Self	FSCDX	Fidelity Advisor Series I Fidelity Advisor Smal	Sale (Partial)	03/25/2024	\$1,001 - \$15,000	n/a
5	Self	FIIAX	Fidelity Advisor Mid Cap II Fund Class A	Sale (Partial)	03/25/2024	\$1,001 - \$15,000	n/a
6	Self	FDAGX	Fidelity Advisor Consumer Staples Fund Class A	Sale (Partial)	03/25/2024	\$1,001 - \$15,000	n/a
7	Spouse	FITLX	Fidelity U.S. Sustainability Index Fund	Purchase	12/13/2024	\$1,001 - \$15,000	n/a

8 #	Spouse Owner	FNIAX	Fidelity Asset Name Advisor New	Transaction Sale (Full) Type	Transaction 11/18/2024 Date	\$1,001 - Amount \$15,000	n/a Comments
			Insights Class A				
9	Spouse	FSCDX	Fidelity Advisor Series I Fidelity Advisor Smal	Sale (Full)	11/18/2024	\$1,001 - \$15,000	n/a
10	Spouse	RERCX	American Funds - Europacific Growth Fund Class R	Sale (Full)	11/18/2024	\$1,001 - \$15,000	n/a
11	Spouse	HLIEX	Jpmorgan Equity Income Fund I Class	Sale (Full)	11/18/2024	\$1,001 - \$15,000	n/a
12	Spouse	PESPX	BNY Mellon Midcap Index Fund Inc. Investor Shar	Sale (Full)	11/18/2024	\$1,001 - \$15,000	n/a
13	Spouse	DISSX	BNY Mellon Smallcap Stock Index Fund Investor Sh	Sale (Full)	11/18/2024	\$1,001 - \$15,000	n/a
14	Spouse	FITLX	Fidelity U.S. Sustainability Index Fund	Purchase	05/03/2024	\$1,001 - \$15,000	n/a
15	Spouse	FITLX	Fidelity U.S. Sustainability Index Fund	Purchase	07/09/2024	\$50,001 - \$100,000	n/a
16	Spouse	FITLX	Fidelity U.S. Sustainability Index Fund	Purchase	11/29/2024	\$15,001 - \$50,000	n/a
17	Spouse	--	JPMCB Smart Retirement DRE 2040 Fund CFA	Sale (Full)	07/09/2024	\$50,001 - \$100,000	n/a

Part 5. Gifts

Did you, your spouse, or dependent child receive any reportable gift during the reporting period? **No**

Part 6. Travel

Did you, your spouse, or dependent child receive any reportable travel? **No**

Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2020	Joint	Mortgage	0	2.75% (30)	\$250,001 - \$500,000	PHH Mortgage Corporation West Palm Beach, FL	Mortgage on residence, located in Albuquerque, NM.

Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **No**

Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **Yes**

#	Date	Parties Involved	Type	Status and Terms	Comments
1	Dec 2003	Myself and the Public Employees Retirement Association of New Mexico Santa Fe, NM	Continuing participation in an employee benefit plan	Defined benefit pension plan.	n/a

Part 10. Compensation

Only required if you are a candidate or this is your first report Did any person or entity pay more than \$5,000 to you or for services provided by you? **This is not my first report.**

Attachments & Comments

No attachments added.

No comments added.

