



Filing ID #10059678

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: David Williams
Status: Congressional Candidate
State/District: CO05

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/25/2024
Period Covered: 01/01/2023– 04/25/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CB&T IRA ⇒ AF U.S. Government Money Market-A [IH]		\$1,001 - \$15,000	Tax-Deferred		
CB&T IRA ⇒ America Balanced Fund-A [IH]		\$1,001 - \$15,000	Tax-Deferred		
CB&T IRA ⇒ Capital World Growth & Income Fund-A [IH]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Underlying Asset Name: Capital World Growth & Income Fund-A					
CB&T IRA ⇒ EuroPacific Growth Fund-A [IH]		\$15,001 - \$50,000	Tax-Deferred		
CB&T IRA ⇒ EuroPacific Growth Fund-A [IH]		\$1,001 - \$15,000	Tax-Deferred		
CB&T IRA ⇒ New Perspective Fund-A [IH]		\$15,001 - \$50,000	Tax-Deferred		
Colorado PERA DC Plan ⇒ PERAAdvantage 2050 Fund [OT]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Retirement Account					
Ent Credit Union Accounts [BA]	JT	\$50,001 - \$100,000	None		
Fox Group, Ltd., 100% Interest [OL]		\$15,001 - \$50,000	Income	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Colorado Springs, CO, US DESCRIPTION: Small business consulting firm.					
Lightbulb Moments, LLC, 100% Interest [OL]	SP	Undetermined	Income	\$2,501 - \$5,000	\$2,501 - \$5,000
LOCATION: Colorado Springs, CO, US DESCRIPTION: Small business					

* 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
State of Colorado	Wages	N/A	\$18,420.58

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Owner	Fox Group, LLC.

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
Colorado Republican Party (Greenwood Village, CO, US)	Chairman/Consulting & Professional Services

SCHEDULE A INVESTMENT VEHICLE DETAILS

- CB&T IRA
- Colorado PERA DC Plan

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: David Williams , 05/25/2024