



Filing ID #10063318

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Sylvester Turner  
**Status:** Congressional Candidate  
**State/District:** TX18

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 01/30/2025  
**Period Covered:** 01/01/2023– 08/5/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America [BA]		\$100,001 - \$250,000	None		
DESCRIPTION: Checking & Money Market Account					
Chase Bank [BA]		\$100,001 - \$250,000	None		
DESCRIPTION: Checking & Savings					
Employees Retirement System of Texas [DB]		Undetermined	Tax-Deferred		
Houston Municipal Employees' Pension System [DB]		Undetermined	Tax-Deferred		
PennMutual - Variable Annuity ⇒ T. Rowe Price Flexibly Managed [OT]		\$250,001 - \$500,000	None		
DESCRIPTION: Mutual Fund					
PennMutual - Whole Life Insurance [WU]		\$100,001 - \$250,000	None		
Pershing - Rollover IRA ⇒ iShares MSCI Intl Quality Factor ETF (IQLT) [EF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Pershing - Rollover IRA ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Pershing - Rollover IRA ⇒ Parnassus Value Equity Fund Investor Shares (PARWX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Pershing - Rollover IRA ⇒ Pershing Government Money Market [IH]		\$1,001 - \$15,000	Tax-Deferred		
Pershing - Rollover IRA ⇒ PGIM High Yield Fund Class A (PBHAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Pershing - Rollover IRA ⇒ PIMCO Income Fund Insti Class (PIMIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Pershing - Rollover IRA ⇒ PIMCO Total Return Fund Class I-2 (PTTPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Pershing - Rollover IRA ⇒ Vanguard Mid-Cap ETF (VO) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Pershing LLC - Brokerage ⇒ Federated Hermes Cap Reserves Money Market [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Pershing LLC - Brokerage ⇒ iShares MSCI USA Min Vol Factor ETF (USMV) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Pershing LLC - Brokerage ⇒ Parnassus Value Equity Fund Investor Shares (PARWX) [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Pershing LLC - Brokerage ⇒ PIMCO Total Return Fund Class I-2 (PTTPX) [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Pershing LLC - Brokerage ⇒ SPDR S&P 500 (SPY) [EF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Pershing LLC - Brokerage ⇒ Thornburg Limited Term Income Fd Cl I Shs (THIIX) [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Veritex Bank [BA]		\$100,001 - \$250,000	None		

DESCRIPTION: Savings

\* 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
City of Houston	Salary	N/A	\$237,736.76
Accession Capital LLC	Advisory Board	\$90,000.00	N/A
Highland Village	Consulting	\$60,000.00	N/A
Nitya Capital	Consulting	\$25,000.00	N/A
University of Houston	Honorarium	\$14,500.00	N/A
COMMENTS: Martin Luther King Commemorative Celebration			
Houston Municipal Employees' Pension System	Retirement	\$16,000.00	N/A
Employees Retirement System of Texas	Retirement	\$35,200.00	\$61,474.32

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2016	Filer and Employees Retirement System of Texas	Defined benefit plan that provides service retirement benefits.
January 2024	Filer and Houston Municipal Employees' Pension System	Defined benefit plan that provides service retirement benefits.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- PennMutual - Variable Annuity
- Pershing - Rollover IRA
- Pershing LLC - Brokerage

## 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

## COMMENTS

## 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:** Sylvester Turner , 01/30/2025