



Filing ID #10072276

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Daniel Schwartz
Status: Congressional Candidate
State/District: MD01

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2025
Filing Date: 08/21/2025
Period Covered: 01/01/2024– 07/22/2025

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 Checking Account [BA] DESCRIPTION: Personal Checking Account		\$1,001 - \$15,000	None		
Bank of America Savings Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	None
MD 529 education savings account for Henry [5F] LOCATION: MD DESCRIPTION: 529 savings account through MD for Henry--Wife is owner of the account.	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Voya Pershing IRA [IH] DESCRIPTION: New IRA rolled over from CSBS Voya 401k in August 2025. Held in cash.		\$50,001 - \$100,000	Capital Gains, Interest	None	Not Applicable

* 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
Conference of State Bank Supervisors	Salary	\$52,604.29	\$179,057.48
Take Profit Trader	1099 income	N/A	\$129,371.50
Topstep	1099 income	\$131,067.14	\$69,705.10
My Funded Futures LLC	1099 income	N/A	\$33,985.00
Tradeify	1099 income	\$4,500.00	N/A
Rose Hill Family Physicians	spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Pennymac Mortgage Servicing	May 2021	Home Mortgage	\$500,001 - \$1,000,000
JT	Sandy Spring Bank	May 2022	HELOC on primary residence	\$100,001 - \$250,000
	BestEgg	August 2025	Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Senior Director, Nonbank Supervision and Enforcement	Conference of State Bank Supervisors

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
April 2025	Dan Schwartz and CSBS/Voya Retirement	I remained in the CSBS controlled 401k employee benefit plan when I left employment at CSBS to become a full-time candidate. Rolled it over into a Voya Pershing IRA account in August 2025. No longer associated with CSBS.

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

None disclosed.

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: Daniel Schwartz , 08/21/2025