



Filing ID #10071807

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Jon Buchwald  
**Status:** Congressional Candidate  
**State/District:** TX24

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 10/19/2025  
**Period Covered:** 01/01/2024– 09/18/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: DRIP income					
Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$50,001 - \$100,000	None		
Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1 - \$200
Avantis Emerging Markets Equity ETF (AVEM) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Band Protocol [CT]		\$1 - \$1,000	None		
Barrick Mining Corporation Common Shares (B) [ST]		\$15,001 - \$50,000	None		
Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$15,001 - \$50,000	None		
Bitcoin [CT]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bitcoin Cash [CT]		\$1 - \$1,000	None		
Broadcom Inc. - Common Stock (AVGO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Celo [CT]		\$1 - \$1,000	None		
Charles Schwab Corporation (SCHW) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Chevron Corporation Common Stock (CVX) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Circle Internet Group, Inc. Class A Common Stock (CRCL) [ST]		\$15,001 - \$50,000	None		
Citigroup, Inc. Common Stock (C) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Compound [CT]		\$1 - \$1,000	None		
CoreWeave, Inc. - Class A Common Stock (CRWV) [ST]		\$15,001 - \$50,000	None		
Ethereum [CT]		\$1,001 - \$15,000	None		
Etrade Joint Account [BA]		\$1,001 - \$15,000	None		
Grayscale Bitcoin Trust (GBTC) [EF]		\$1,001 - \$15,000	None		
Grayscale Bitcoin Trust (GBTC) [EF]		\$15,001 - \$50,000	None		
International Business Machines Corporation Common Stock (IBM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Internet Computer [CT]		\$1 - \$1,000	None		
Janus Henderson Contrarian Fund - D Shares (JACNX) [MF]		\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
Janus Henderson Growth and Income Fund - D Shares (JNGIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Janus Henderson Mid Cap Value Fund - D Shares (JNMCX) [MF]		\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
Janus Henderson Overseas Fund - D Shares (JNOSX) [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Johnson & Johnson Common Stock (JNJ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Litecoin [CT]		\$1 - \$1,000	None		
Lockheed Martin Corporation Common Stock (LMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Maker [CT]		\$1 - \$1,000	None		
McDonald's Corporation Common Stock (MCD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
MIA Labs [PS] DESCRIPTION: Converted SAFE note		\$1,001 - \$15,000	None		
Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley Private Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
NVIDIA Corporation - Common Stock (NVDA) [ST]		\$50,001 - \$100,000	Dividends	\$1 - \$200	\$1 - \$200
SAFE Note - Grain Technologies [PS] DESCRIPTION: Private company investment in a SAFE Note		\$15,001 - \$50,000	None		
Stellar Lumens [CT]		\$1 - \$1,000	None		
T. Rowe Price Cash Reserves Fund (TSCXX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
T. Rowe Price Communications & Technology Fund, Inc. (PRMTX) [MF]		\$15,001 - \$50,000	None		
T. Rowe Price Health Sciences Fund Inc. (PRHSX) [MF]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
T. Rowe Price International Discovery Fund (PRIDX) [MF]		\$15,001 - \$50,000	None		
T. Rowe Price Small-Cap Value Fd Inc. (PRSVX) [MF]		\$15,001 - \$50,000	None		
Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Tesla, Inc. - Common Stock (TSLA) [ST]		\$50,001 - \$100,000	None		
The Graph [CT]		\$1 - \$1,000	None		
Verizon Communications Inc. Common Stock (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Walmart Inc. Common Stock (WMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
XRP [CT]		\$1,001 - \$15,000	None		
Alumni Ventures ⇒ Chestnut Street 6 [HE]		\$15,001 - \$50,000	None		
Alumni Ventures ⇒ Syndications ⇒ AVSF – Impulse Space 2023 [OT] DESCRIPTION: Private company investment via syndication		\$15,001 - \$50,000	None		
Alumni Ventures ⇒ Syndications ⇒ AVSF – Kyte 2022 [OT] DESCRIPTION: Private company investment via syndication		\$1,001 - \$15,000	None		
Alumni Ventures ⇒ Syndications ⇒ AVSF – Lightship 2023 [OT] DESCRIPTION: Private company investment via syndication		\$1,001 - \$15,000	None		
Alumni Ventures ⇒ Syndications ⇒ AVSF – Wispr AI 2023 [PS] DESCRIPTION: Private company investment via syndication		\$1,001 - \$15,000	None		
Betterment ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Betterment ⇒		\$15,001 - \$50,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Integrity Mid Cap Value Fund Class R6 (MRIMX) [MF]					
Betterment ⇒ T. Rowe Price Dividend Growth Fund, Inc. (PRDGX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Betterment ⇒ Vanguard Explorer Fund Admiral Shares (VEXRX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity IRA ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Fidelity IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$15,001 - \$50,000	None		
Fidelity IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Fidelity IRA ⇒ Bakkt Holdings, Inc. Class A Common Stock (BKKT) [ST]		\$1 - \$1,000	None		
Fidelity IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$15,001 - \$50,000	None		
Fidelity IRA ⇒ EPAM Systems, Inc. Common Stock (EPAM) [ST]		\$1,001 - \$15,000	None		
Fidelity IRA ⇒ Etsy, Inc. - Common Stock (ETSY) [ST]		\$1,001 - \$15,000	None		
Fidelity IRA ⇒ Grayscale Bitcoin Trust (GBTC) [EF]		\$15,001 - \$50,000	None		
Fidelity IRA ⇒ Grayscale Bitcoin Trust (GBTC) [EF]		\$1,001 - \$15,000	None		
Fidelity IRA ⇒ Huntington Bank IRA [BA]		\$1 - \$1,000	None		
Fidelity IRA ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		\$50,001 - \$100,000	None		
Fidelity IRA ⇒ US Bank IRA [BA]		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Wharton Alumni Angels ⇒ Strados Labs [PS]  DESCRIPTION: Private company stock		\$1,001 - \$15,000	None		

\* 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
Market-Partners, Inc	VP of Customer Research	\$70,000.00	\$158,000.00
Southern Methodist University	Adjunct Faculty	\$5,000.00	N/A
UT Dallas	Adjunct Faculty	\$3,000.00	\$9,000.00
Apex Clearing Corporation	Spouse Salary	\$97,000.00	\$131,624.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Fairway Mortgage	November 2024	Home Mortgage	\$500,001 - \$1,000,000

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

### SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"> <li>Fidelity IRA</li> <li>Betterment</li> </ul>
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- Alumni Ventures
- Wharton Alumni Angels
- Alumni Ventures ⇒ Syndications

## 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:** Jon Buchwald , 10/19/2025