



Filing ID #10068389

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** David Oxman  
**Status:** Congressional Candidate  
**State/District:** PA03

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 08/13/2025  
**Period Covered:** 01/01/2024– 07/14/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
360 Performance Savings Account [BA]	JT	\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Bank of America Checking and Savings Account [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Merck Supplemental Savings Plan [OT] DESCRIPTION: Part of Spouse's Retirement Plan Through Merck	SP	\$15,001 - \$50,000	Tax-Deferred		
Vanguard ESG U.S. Stock ETF (ESGV) [EF] DESCRIPTION: Custodial account for child		\$1,001 - \$15,000	Capital Gains	None	None
Fidelity Brokerage Account ⇒ Vanguard Total Stock Market ETF (VTI) [EF]	JT	\$50,001 - \$100,000	Capital Gains	None	None
Fidelity Retirement Account ⇒ CREF Core Bond [FN]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Retirement Account ⇒ Merck US Savings Plan [OT] DESCRIPTION: Part of Spouse's Retirement Plan through Merck	SP	\$500,001 - \$1,000,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Retirement Account ⇒ Vanguard Target Retirement 2030 Fund (VTHRX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Holdings are in Retirement Account from former employer, Brigham & Women's Hospital. Includes BWH 403B Plan and BWH PRO Staff Plan					
Morgan Stanley Brokerage Account ⇒ Fidelity Money Market [BA]	SP	\$250,001 - \$500,000	Capital Gains	\$100,001 - \$1,000,000	None
DESCRIPTION: Sale of Stock; Holdings now in cash					
PA 529 ⇒ Pennsylvania Target Enrollment Funds [5F]	DC	\$250,001 - \$500,000	Tax-Deferred		
LOCATION: PA DESCRIPTION: Jakob and Lia Oxman College Savings 529 Plan through state of Pennsylvania. Included PA Target Enrollment Funds					
TIAA Cref Retirement Account ⇒ CREF Global Equities Account - R3 (QCGLIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
TIAA Cref Retirement Account ⇒ CREF Growth Account - R3 (QCGRIX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
TIAA Cref Retirement Account ⇒ CREF Money Market R3 [BA]	SP	\$1 - \$1,000	Tax-Deferred		
TIAA Cref Retirement Account ⇒ CREF Stock Account - R3 (QCSTIX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
TIAA Cref Retirement Account ⇒ Nuveen Lifecycle 2030 Fund Retirement (TCLNX) [MF]	SP	\$500,001 - \$1,000,000	Tax-Deferred		
DESCRIPTION: TIAA CREF Account Contains Following Subcategories 1) Jefferson Defined Contribution Retirement Plan 2) Jefferson University Physicians 3) Brigham and Women's Hospital Professional Plan 4) Roth IRA 5) Traditional IRA					
TIAA Cref Retirement Account ⇒ TIAA Real Estate Account (QREARX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
TIAA Cref Retirement Account ⇒ TIAA Traditional [FN]	SP	\$1,001 - \$15,000	Tax-Deferred		

\* 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
Silver Golub Teitell	Medical legal consulting		\$5,600.00

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2025	Thomas Jefferson University Hospital and Sidney Kimmel Medical College	Unpaid leave starting June 30th 2025 Duration of leave is 6 months with agreement to review on December 30, 2025

### 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 Retirement Account DESCRIPTION: Retirement account from former employer. Included BWH 403B and BWPO Professional Staff Plan.</li><li>PA 529 (Owner: DC) LOCATION: PA DESCRIPTION: College savings account for son Jakob Oxman. Included Pennsylvania Target Enrollment Fund 2029/2029 and Pennsylvania Target Enrollment Fund 2024/2025</li><li>Morgan Stanley Brokerage Account (Owner: SP)</li><li>TIAA Cref Retirement Account (Owner: SP) DESCRIPTION: Spouse's retirement account from former employer</li><li>Fidelity Retirement Account (Owner: SP) DESCRIPTION: Retirement account from spouse's employer Merck</li><li>Fidelity Brokerage Account (Owner: JT)</li></ul>
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### 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 Oxman , 08/13/2025