



Filing ID #10070395

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Kevin Beryl Burge
Status: Congressional Candidate
State/District: TX24

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 06/14/2025
Period Covered: 01/01/2024– 05/16/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ADA [CT] DESCRIPTION: Crypto		\$1 - \$1,000	None		
American Airline Credit Union [BA] DESCRIPTION: Pay Truck payment	JT	\$1,001 - \$15,000	None		
American Airline Credit Union [BA] DESCRIPTION: Dependent Savings Account	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
American Airline Credit Union [BA] DESCRIPTION: 60 month CD	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Bay First National Bank [BA] DESCRIPTION: This is to collect Rent for Fuquay House		\$1,001 - \$15,000	None		
BCH [CT] DESCRIPTION: Crypto		\$1,001 - \$15,000	Capital Gains	None	None
BCH [CT]	SP	\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ETH [CT] DESCRIPTION: Crypto		\$1 - \$1,000	None		
Gunslinger Tactical LLC, 1% Interest [OL] LOCATION: Fuquay-Varina, Wake, NC, US DESCRIPTION: Start-up business		\$1 - \$1,000	Partner investment	\$1 - \$200	\$1 - \$200
Home in Fuquay-Varina, NC [RP] LOCATION: Fuquay-Varina, Wake, NC, US		\$250,001 - \$500,000	None		
Home in North Richland Hills [RP] LOCATION: TX, TX, US DESCRIPTION: This is my primary residency	JT	\$250,001 - \$500,000	None		
Home in Springfield, VA [RP] LOCATION: Springfield, VA, US		\$500,001 - \$1,000,000	None		
Openbank High Yield Account [BA] DESCRIPTION: High Yield Savings Account		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$201 - \$1,000
Pentagon Federal [BA] DESCRIPTION: Account to collect money from Springfield Rental		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
SOL [CT] DESCRIPTION: Crypto		\$1 - \$1,000	None		
TSP [IH]		\$1,001 - \$15,000	None		
USAA FSB [BA] DESCRIPTION: This is the family's main account. Mostly used for checking.		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Yeild Street Investments [OT] DESCRIPTION: Private Market Investments	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$201 - \$1,000
Alight Financial Advisors ⇒ Caterpillar 401K [OT] DESCRIPTION: Employer 401K		\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab ⇒ 22nd Century Group, Inc - Common Stock (XXII) [ST]		\$1 - \$1,000	Capital Gains	\$1 - \$200	\$1 - \$200
Charles Schwab ⇒ Airbnb, Inc. - Class A Common Stock (ABNB) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ Altria Group, Inc. (MO) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ American Airlines Group, Inc. - Common Stock (AAL) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ Beamr Imaging Ltd. - Ordinary Share (BMR) [ST]		\$1 - \$1,000	Capital Gains	None	None
Charles Schwab ⇒ Caterpillar, Inc. Common Stock (CAT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Charles Schwab ⇒ Digital Realty Trust, Inc. Common Stock (DLR) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ FMC Corporation Common Stock (FMC) [ST]		\$1 - \$1,000	Capital Gains	None	None
Charles Schwab ⇒ FOMO WORLDWIDE INC (IGOT) [ST]		\$1 - \$1,000	Capital Gains	None	None
Charles Schwab ⇒ GameStop Corporation Common Stock (GME) [ST]		\$1 - \$1,000	Capital Gains	None	None
Charles Schwab ⇒ MARA Holdings, Inc. - Common Stock (MARA) [ST]		\$1 - \$1,000	Capital Gains	None	None
Charles Schwab ⇒ Mind Medicine (MNMD) [ST]		\$1 - \$1,000	Capital Gains	None	None
Charles Schwab ⇒ MITESCO INC (MITI) [ST]		\$1 - \$1,000	Capital Gains	None	None
Charles Schwab ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1 - \$1,000	Capital Gains	None	None
Charles Schwab ⇒		\$1 - \$1,000	Capital Gains	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Oxford Lane Capital Corp. - Closed End Fund (OXLC) [ST]					
Charles Schwab ⇒ Planet Labs PBC Class A Common Stock (PL) [ST]		\$1 - \$1,000	Capital Gains	\$1 - \$200	None
Charles Schwab ⇒ ProShares Trust VIX Short-Term Futures ETF (VIXY) [EF]		\$1 - \$1,000	Capital Gains	None	None
Charles Schwab ⇒ Southern Company (SO) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ Vanguard Information Tech ETF (VGT) [EF]		\$1,001 - \$15,000	Capital Gains	\$1 - \$200	\$1 - \$200
Charles Schwab ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ Waste Management, Inc. Common Stock (WM) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ PCRA Trust ⇒ Cohen & Steers Realty Shares, Inc. (CSRSX) [MF]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ PCRA Trust ⇒ Schwab International Index Fund - Select Shares (SWISX) [MF]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ PCRA Trust ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ PCRA Trust ⇒ Schwab Short-Term Bond Index Fund (SWSBX) [MF]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ PCRA Trust ⇒ Schwab Small-Cap Index Fund-Select Shares (SWSSX) [MF]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ PCRA Trust ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$1,001 - \$15,000	Capital Gains	None	None
Charles Schwab ⇒ PCRA Trust ⇒		\$1,001 - \$15,000	Capital Gains	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab U.S. Aggregate Bond Index Fund (SWAGX) [MF]					
Fidelity ⇒ Blended Fund Investment [OT]	SP	\$50,001 - \$100,000	None		
DESCRIPTION: This is an employee sponsored 401K					
Stash Capital ⇒ AvWorks Aviation Corp. Common Stock (SPLI) [ST]		\$1 - \$1,000	Capital Gains	None	None
Stash Capital ⇒ Caterpillar, Inc. Common Stock (CAT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Stash Capital ⇒ Fidelity High Dividend ETF (FDVV) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: IRA					
Stash Capital ⇒ iShares Core 80/20 Aggressive Allocation ETF (AOA) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: IRA					
Stash Capital ⇒ iShares Core High Dividend ETF (HDV) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: IRA					
Stash Capital ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stash Capital ⇒ iShares Core Total USD Bond Market ETF (IUSB) [EF]		\$1,001 - \$15,000	Capital Gains	None	None
Stash Capital ⇒ iShares Floating Rate Bond ETF (FLOT) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: IRA					
Stash Capital ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Stash Capital ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Stash Capital ⇒ Schwab US Dividend Equity ETF (SCHD) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Stash Capital ⇒ Shake Shack, Inc. Class A Common Stock (SHAK) [ST]		\$1 - \$1,000	None		
Stash Capital ⇒ Simon Property Group, Inc. Common Stock (SPG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: IRA					
Stash Capital ⇒ Vanguard Communication Services ETF (VOX) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Stash Capital ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UNC Optional Retirement Program ⇒ UNC ORP [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: This is a retirement program for UNC System, I am unable to see the individual investments.					

* 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
Caterpillar Inc	Salary	\$67,477.31	\$119,261.12
American Airlines	Salary	\$15,890.87	\$54,371.05
Texas Army National Guard	Salary	\$5,330.17	\$6,653.45
Wodensource LLC	Rent	\$12,600.00	\$18,076.39
Non LLC Rental Property	Rent	\$19,800.00	\$27,138.96

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	American Airlines Credit Union	2024	Auto Loan	\$15,001 - \$50,000
JT	USAA	2025	Personal Loan	\$15,001 - \$50,000
	Penny Mac LLC	2018	Mortgage on Rental Property	\$100,001 - \$250,000

JT	Penny Mac LLC	2020	Mortgage on Rental Property	\$250,001 - \$500,000
----	---------------	------	-----------------------------	-----------------------

SCHEDULE E: POSITIONS

Position	Name of Organization
Employee	Caterpillar Inc.
Manager Member	Wodensource LLC
Member	Gunslinger Tactical 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
Caterpillar Inc (Irving, TX, US)	This is an annual bonus from the company

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">Charles Schwab DESCRIPTION: Individual Stocks, IRA, and 401KStash CapitalFidelity (Owner: SP)Alight Financial Advisors DESCRIPTION: Caterpillar 401KUNC Optional Retirement Program DESCRIPTION: 401K from NCSUCharles Schwab ⇒ PCRA Trust DESCRIPTION: Employeee Funded 401k
--

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: Kevin Beryl Burge , 06/14/2025