



Filing ID #10019724

# FINANCIAL DISCLOSURE REPORT

---

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

---

## FILER INFORMATION

**Name:** Justin Leonard Lurie  
**Status:** Congressional Candidate  
**State/District:** TX02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2017  
**Filing Date:** 01/13/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Justin & Elizabeth Lurie Living Trust ⇒ 529 College Savings Account ⇒ American Funds New Perspective Fund® Class 529-A; Cnpax	JT	\$1,001 - \$15,000	Tax-Deferred		
Justin & Elizabeth Lurie Living Trust ⇒ 529 College Savings Account ⇒ American Funds The Growth Fund of America® Class 529-A; CGFAX	JT	\$1,001 - \$15,000	Tax-Deferred		
Justin & Elizabeth Lurie Living Trust ⇒ Rollover IRA ⇒ European Stock Fund, PRESX DESCRIPTION: ROTH IRA at TD Ameritrade	JT	\$15,001 - \$50,000	Tax-Deferred		
Justin & Elizabeth Lurie Living Trust ⇒ Rollover IRA ⇒ The Merger Fund® Investor Class, MERFX DESCRIPTION: TD Ameritrade account, rollover IRA	JT	\$1,001 - \$15,000	Tax-Deferred		
Justin & Elizabeth Lurie Living Trust ⇒ Trading Account ⇒ Bank of America Corporation (BAC)	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Dividend reinvestment					
Justin & Elizabeth Lurie Living Trust ⇒ Trading Account ⇒ McDonald's Corporation (MCD)	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Dividend reinvestment					
Justin & Elizabeth Lurie Living Trust ⇒ Trading Account ⇒ SMALLCAP WORLD CL A	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DESCRIPTION: Janney Account					
Sterling Concord Partners, LLC, 100% Interest		\$1,000,001 - \$5,000,000	None		
LOCATION: Houston, TX, US					
DESCRIPTION: Sterling Concord Partners, mergers and acquisitions broker / dealer, registered with the Texas State Securities Board					

\* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Sterling Concord Partners	company ownership	N/A	\$1.00
Amazon	book sales	\$1,245.00	\$1,245.00
COMMENTS: Book published in 2014, residual payments			
Identity Automation	spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Navient	2006	Student Loans	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Partner	Venture Capricorn
COMMENTS: Boutique investment bank based in Austin, TX	

Position	Name of Organization
Partner	Sterling Concord Partners
COMMENTS: Founding and lead partner, Sterling Concord Partners is a boutique investment bank based in Houston, Texas	
Director of Media & Communications	American Petroleum Institute, Houston

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Justin & Elizabeth Lurie Living Trust (100% Interest) (Owner: JT)  
DESCRIPTION: Revocable living trust
- Justin & Elizabeth Lurie Living Trust ⇒ 529 College Savings Account (Owner: JT)  
LOCATION: TX
- Justin & Elizabeth Lurie Living Trust ⇒ Rollover IRA (Owner: JT)
- Justin & Elizabeth Lurie Living Trust ⇒ Trading Account (100% Interest) (Owner: JT)  
LOCATION: TX, US

## 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:** Justin Leonard Lurie , 01/13/2018