



Filing ID #10018542

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Nancy Soderberg
Status: Congressional Candidate
State/District: FL06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 11/10/2017

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		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity Puritan Fund (FPURX)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Inherited IRA ⇒ Fidelity Balanced (FBALX)		\$1,001 - \$15,000	Tax-Deferred		
International Crisis Group 401K ⇒ CREF Stock R1		\$1,001 - \$15,000	Tax-Deferred		
International Crisis Group 401K ⇒ TIAA Traditional		\$1,001 - \$15,000	Tax-Deferred		
Palantir Technologies Inc.		\$1,000,001 - \$5,000,000	None		
DESCRIPTION: Nonstatutory Stock Option- Exercise Price \$1.50; Expiration Date 10/12/2021.					
Palantir Technologies Inc.		\$500,001 - \$1,000,000	None		
DESCRIPTION: Nonstatutory Stock Option- Exercise Price \$0.52; Expiration Date 10/12/2020.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rollover IRA ⇒ Fidelity Asset Manager (FAMRX)		\$50,001 - \$100,000	Tax-Deferred		
Rollover IRA ⇒ Fidelity Overseas (FOSFX)		\$50,001 - \$100,000	Tax-Deferred		
Soderberg Solutions Inc., 100% Interest LOCATION: Jacksonville Beach, FL, US DESCRIPTION: Consulting		\$100,001 - \$250,000	Ordinary Business Income	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
Soderberg Solutions SEP ⇒ Fidelity Asset Manager 85% (FAMRX)		\$250,001 - \$500,000	Tax-Deferred		
Soderberg Solutions SEP ⇒ Fidelity Government Cash Reserves (FDRXX)		\$100,001 - \$250,000	Tax-Deferred		
State University System of FL 401K ⇒ CREF Equity Index R3		\$50,001 - \$100,000	Tax-Deferred		
State University System of FL 401K ⇒ CREF Global Equities R3		\$50,001 - \$100,000	Tax-Deferred		
State University System of FL 401K ⇒ CREF Growth R3		\$50,001 - \$100,000	Tax-Deferred		
University of North Florida 401K ⇒ CREF Equity Index R3		\$1,001 - \$15,000	Tax-Deferred		
University of North Florida 401K ⇒ CREF Global Equities R3		\$15,001 - \$50,000	Tax-Deferred		
University of North Florida 401K ⇒ T. Rowe Inst Lrg Cap Grw		\$1,001 - \$15,000	Tax-Deferred		
uReveal, Inc. DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 12/31/2020		\$1,001 - \$15,000	None		
uReveal, Inc. DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 1/31/2020		\$1,001 - \$15,000	None		
uReveal, Inc. DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 2/29/2020		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 3/31/2020					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 04/30/2020					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 05/31/2020					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 06/30/2020					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 07/31/2020					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 12/31/2020					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 6/24/2019					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 09/30/2020					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 10/31/2020					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 11/30/2020					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 12/31/2021					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 01/31/2021					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 02/28/2021					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 03/31/2021					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 04/30/2021					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 05/31/2021					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 06/30/2021					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 07/31/2021					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 08/31/2021					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 09/30/2021					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 10/31/2021					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 11/30/2021					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 12/31/2022					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 01/31/2022					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 02/28/2022					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 03/31/2022					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 04/30/2022					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 05/31/2022					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 06/30/2022					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 07/31/2022					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 08/31/2022					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 09/30/2022					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 10/31/2022					
uReveal, Inc.		\$1,001 - \$15,000	None		
DESCRIPTION: Stock Option- Exercise Price \$.05; Expiration Date 08/31/2020					

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
University of North Florida	Salary	\$74,936.42	\$91,504.96
Soderberg Solutions, LLC	Salary	\$160,000.00	\$242,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America	November 2017	Credit Card	\$15,001 - \$50,000
	United States Senate Federal Credit Union	November 2017	Personal Loan	\$15,001 - \$50,000
	American Express	November 2017	Credit Card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Vice Chair of Board	National Committee on American Foreign Policy
Board of Advisors to the President	Naval War College
Board of Advisors to the President	Naval Post Graduate School
Senior Strategic Advisor	Aurora Prize for Awakening Humanity
Advisory Council Member	World Affairs Council Jacksonville
Senior Strategic Advisor	Global Cities
Advisory Council Member	The Stanley Foundation
Board of Directors	The Jacksonville Port Authority
COMMENTS: Held position through August 2015.	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2014	Soderberg Solutions and uReveal	Deferred compensation and referral fees for services previously rendered. The initial terms of this agreement covered time period 3/1/2014 – 12/31/14 and have been subject to annual Board approval.
December 2014	Soderberg Solutions and uReveal	Deferred compensation and referral fees for services previously rendered. The initial terms of this agreement covered time period 1/1/2015 – 12/31/15 and have been subject to annual Board approval.
September 2015	Soderberg Solutions and The Asia Group	Strategic advice and referral fees; success fee.
September 2005	International Crisis Group and Self	Continuing participation in a defined benefit retirement plan managed by former employer. Employer no longer contributes to the plan.

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

Source (Name and Address)	Brief Description of Duties
The Asia Group (Washington, DC, US)	Strategic advice and referral fees
Global Cities (New York, NY, US)	Strategic advice
Citizen's Energy (Boston, MA, US)	Strategic advice
DCI (Washington, DC, US)	Strategic advice
Edelman (Washington, DC, US)	Strategic advice
Columbia University (New York, NY, US)	Strategic advice

Source (Name and Address)	Brief Description of Duties
Kelmar (Rockland, MA, US)	Strategic advice
NIP Global Ltd (Herzliya, IL)	Strategic advice
Bridge International Academies (Nairobi, KE)	Strategic advice

SCHEDULE A ASSET CLASS DETAILS

- Inherited IRA
- International Crisis Group 401K
- Rollover IRA
- Soderberg Solutions SEP
- State University System of FL 401K
- University of North Florida 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

COMMENTS

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: Nancy Soderberg , 11/10/2017