



Filing ID #10029678

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Wendy Davis  
**Status:** Congressional Candidate  
**State/District:** TX21

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2019  
**Filing Date:** 10/19/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Betterment SEP IRA ⇒ iShares Core S&P Total US Stock Market ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment SEP IRA ⇒ iShares Core Total US Bond Market ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment SEP IRA ⇒ SPDR S&P 500 Value ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment SEP IRA ⇒ Vanguard FTSE Developed Markets ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment SEP IRA ⇒ Vanguard FTSE Emerging Markets ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment SEP IRA ⇒ Vanguard Total International Bond ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment Taxable Investment Account ⇒ iShares Core Total US Bond Market ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Betterment Taxable Investment Account ⇒ iShares Emerging Markets USD Bond ETF [EF]		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Betterment Taxable Investment Account ⇒ iShares National AMT-Free Muni Bond ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1 - \$200
Betterment Taxable Investment Account ⇒ Schwab US Broad Market ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Betterment Taxable Investment Account ⇒ Vanguard Emerging Markets Govt Bond ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment Taxable Investment Account ⇒ Vanguard FTSE Developed Markets ETF [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
Betterment Taxable Investment Account ⇒ Vanguard FTSE Emerging Markets ETF [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Betterment Taxable Investment Account ⇒ Vanguard Mid-Cap Value ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment Taxable Investment Account ⇒ Vanguard Short-Term Inflation-Protected Securities ETF [EF]		\$1,001 - \$15,000	None		
Betterment Taxable Investment Account ⇒ Vanguard Small-Cap Value ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment Taxable Investment Account ⇒ Vanguard Total International Bond ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Betterment Taxable Investment Account ⇒ Vanguard Total Stock Market ETF [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Betterment Taxable Investment Account ⇒ Vanguard Value ETF [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Betterment Traditional IRA ⇒ iShares Emerging Markets USD Bond ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment Traditional IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SPDR S&P 500 Value ETF [EF]					
Betterment Traditional IRA ⇒ SPDR S&P 600 Small Cap Value ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard FTSE Developed Markets ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard FTSE Emerging Markets ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Mid-Cap Value ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Short-Term Inflation-Protected Securities ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Small-Cap Value ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Total International Bond ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard Total Stock Market ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
Betterment Traditional IRA ⇒ Vanguard US Total Bond Market ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Southwest Bank [BA]		\$1,001 - \$15,000	None		
Spunky Panther Real Estate LLC ⇒ O'l Vic LP ⇒ Commercial real estate, Fort Worth, TX [RP] LOCATION: Forth Worth, CA, US		None	Capital Gains, Rent	None	\$50,001 - \$100,000
Vanguard Tax-Deferred Annuity ⇒ Vanguard Equity Income [MF]		\$100,001 - \$250,000	Tax-Deferred		
Vanguard Tax-Deferred Annuity ⇒ Vanguard Equity Index [MF]		\$250,001 - \$500,000	Tax-Deferred		
Vanguard Tax-Deferred Annuity ⇒		\$100,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard International [MF]		\$250,000			
Vanguard Tax-Deferred Annuity ⇒ Vanguard Mid-Cap Index [MF]		\$100,001 - \$250,000	Tax-Deferred		
Vanguard Tax-Deferred Annuity ⇒ Vanguard Real Estate Index [MF]		\$50,001 - \$100,000	Tax-Deferred		
Vanguard Tax-Deferred Annuity ⇒ Vanguard Total Bond Market Index [MF]		\$100,001 - \$250,000	Tax-Deferred		
Vanguard Tax-Deferred Annuity ⇒ Vanguard Total Stock Market Index [MF]		\$250,001 - \$500,000	Tax-Deferred		
Zigpaw, LLC ⇒ Residential rental property [RP]		\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Aspen, CO, US					

\* Asset class 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
Deeds Not Words	salary	\$26,000.00	\$40,000.00
Brown University	speaking fee	N/A	\$6,000.00
Greater Talent Network	speaking fee	N/A	\$23,680.00
Keppler Speakers	speaking fee	N/A	\$8,500.00
New Age Media Ventures LLC	speaking fee	N/A	\$15,000.00
Planned Parenthood Empire State Votes	speaking fee	N/A	\$5,000.00
Planned Parenthood of Southwest and Central Florida	speaking fee	N/A	\$7,000.00
New Venture Fund	salary	N/A	\$1,885.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	First Bank, Glenwood Springs, CO	October 2017	Mortgage on rental property	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Founding Director/Secretary/Treasurer	Deeds Not Words
Member	Spunky Panther Real Estate LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
July 2019	Filer and Deeds Not Words	Continuation of health insurance through COBRA

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>◦ Betterment SEP IRA</li><li>◦ Betterment Taxable Investment Account LOCATION: US</li><li>◦ Betterment Traditional IRA</li><li>◦ Spunky Panther Real Estate LLC LOCATION: US</li><li>◦ Spunky Panther Real Estate LLC ⇒ O'l Vic LP LOCATION: US</li><li>◦ Vanguard Tax-Deferred Annuity</li><li>◦ Zigpaw, LLC LOCATION: Austin, TX, US</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

☐ 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:** Wendy Davis , 10/19/2019