



Filing ID #10016325

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: David Balat
Status: Congressional Candidate
State/District: TX07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2017
Filing Date: 06/14/2017
Period Covered: 01/01/2016– 05/31/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
BBVA Compass Bank accounts		\$15,001 - \$50,000	Interest	\$.20	\$1 - \$200
Encore Kinetics Group, LLC		\$100,001 - \$250,000	mineral royalties, Rent	\$1,001 - \$2,500	\$5,001 - \$15,000
LOCATION: Houston, TX, US DESCRIPTION: Income comprised of revenues from mineral lease and royalties					
Northwest Mutual life insurance policy		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Life insurance policy					
Olive Branch International Services, LLC (dba Olive Branch Mgmt Servs)		\$50,001 - \$100,000	None		
LOCATION: Houston, TX, US DESCRIPTION: Ownership interest in healthcare management consulting firm, focused on management and finance.					

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Humble Surgical Hospital	salary and bonus		\$40,000.00
Helms-Patel, LLC (dba Torch Recovery Services)	salary	\$60,000.00	\$116,030.00
Olive Branch International Enterprises, LLC	salary		\$72,000.00
Atria Senior Living	Spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Interim CEO	Humble Surgical Hospital
President	Helms-Patel, LLC (dba Torch Recovery Services)
Executive Director	Olive Branch International Enterprises, 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
Dan Newcomb (Missouri City, TX, US)	consulting through Olive Branch Management Services

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 Balat , 06/14/2017