



Filing ID #10029054

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. W. Greg Steube
Status: Congressional Candidate
State/District: FL17

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2018
Filing Date: 08/13/2019
Period Covered: 01/01/2017– 04/30/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-------------------------|-----------------------------|-------------------------------|-----------------------|
| INVESTMENT ⇒ Synovus Financial Corp. (SNV) [ST] | SP | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | Not Applicable |
| IRA ⇒ DOUBLELINE SHILLER ENHANCED CAP CL N (DSENX) [MF] | SP | \$50,001 - \$100,000 | Tax-Deferred | | |
| IRA ⇒ FIDELITY CAPITAL & INCOME (FAGIX) [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| IRA ⇒ FIDELITY CORPORATE BOND FUND (FCBFX) [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| IRA ⇒ FIDELITY EUROPE (FIEUX) [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | |
| IRA ⇒ FMI INTERNATIONAL (FMIJX) [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | |
| IRA ⇒ | SP | \$15,001 - \$50,000 | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-----------------------|----------------|-------------------------------|-----------------------|
| JPMORGAN MRKT EXPNSNENHANCED INDEX CL A (OMEAX) [MF] | | | | | |
| IRA ⇒ MATTHEWS ASIA DIVIDEND FUND (MAPIX) [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | |
| IRA ⇒ TRIBUTARY SMALL COMPANY FD INSTL (FOSCX) [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | |
| Legal Strategies & Consulting, P.L. [OL] LOCATION: SARASOTA, FL, US DESCRIPTION: LAW FIRM INCOME REPORTED IN SCH C | | \$1,001 - \$15,000 | None | | |
| Residential Rental Property Tallahassee, FL [RP] LOCATION: Tallahassee, Monroe, FL, US | | \$250,001 - \$500,000 | Rent | \$5,001 - \$15,000 | \$15,001 - \$50,000 |
| Residential Rental Property, Foxbrook [RP] LOCATION: Parrish/ Manatee, FL, US | | None | Capital Gains | None | \$50,001 - \$100,000 |
| Roth IRA ⇒ American Century One Choice Very AGGR I (AOVIX) [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| Roth IRA ⇒ FDIC Insured Deposit (CASH) [IH] | | \$1,001 - \$15,000 | None | | |
| SEP IRA ⇒ Oakmark Intl Investor CL (OAKIX) [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| SEP IRA ⇒ Parnassus Endeavor Fund (PARWX) [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| SEP IRA ⇒ T Rowe Price GLBL Multi Sector Bond FD (PRSNX) [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| SEP IRA ⇒ Zacks Small-Cap Core Fund (ZSCCX) [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| State of Florida Pension - DEFINED BENEFIT PLAN [DB] | | Undetermined | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|----------------|-------------------------------|-----------------------|
| STOCK PLAN ⇒ Synovus Financial Corp. (SNV) [ST] DESCRIPTION: EMPLOYEE STOCK PLAN | SP | \$1,001 - \$15,000 | None | | |
| USAA Checking Account [BA] | | \$1,001 - \$15,000 | None | | |
| WG GLOBAL ENTERPRISES LLC ⇒ J & G Holdings of Sarasota, LLC [RP] LOCATION: Bradenton/ Manatee, FL, US DESCRIPTION: HOLDING COMPANY FOR RENTAL PROPERTY IN BRADENTON, FL. | JT | \$100,001 - \$250,000 | Rent | \$2,501 - \$5,000 | \$5,001 - \$15,000 |
| WG GLOBAL ENTERPRISES LLC ⇒ J&G Property Managment, LLC [RP] LOCATION: LAKEWOOD RANCH, FL, US DESCRIPTION: HOLDING COMPANY FOR THE RENTAL PROPERTY IN LAKEWOOD RANCH, FL. | JT | \$100,001 - \$250,000 | None | | |
| WG GLOBAL ENTERPRISES LLC ⇒ WG GLOBAL ENTERPRISES LLC [OL] LOCATION: LAKEWOOD RANCH, FL, US DESCRIPTION: HOLDING COMPANY. DETAILS OF ASSETS ARE LISTED IN J&G PROPERTY MANAGEMENT AND J&G HOLDINGS SCH A LISTINGS. INCOME ACCOUNTED FOR IN EACH LISTING. | JT | \$100,001 - \$250,000 | None | | |

* 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 |
|-------------------------------------|-------------------------------------|-------------------------------|-----------------------|
| Becker & Poliakoff, P.A. | Salary | N/A | \$75,000.06 |
| State of Florida | Salary | \$8,882.04 | \$26,646.12 |
| Synovus Trust, N.A. | spouse salary | N/A | N/A |
| Legal Strategies & Consulting, P.L. | INCOME ATTRIBUTED TO PERSONAL LABOR | \$63,475.00 | \$65,217.00 |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|-------------|---------------|--|----------------------|
| | CenterState | Feb 2016 | Mortgage for J&G Holdings, LLC Rental property - BRADENTON, FL | \$50,001 - \$100,000 |

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|----------------------------|---------------|--|-----------------------|
| | Wells Fargo Home Mortgage | January 2012 | Mortgage for rental property in TALLAHASSEE, Florida | \$100,001 - \$250,000 |
| | Bank of America Home Loans | October 2010 | Mortgage on rental property in Parrish, Florida | \$100,001 - \$250,000 |
| SP | Sofi | January 2012 | Student Loan | \$15,001 - \$50,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|---------------|-------------------------------------|
| PARTNER | WG Global Enterprises, LLC |
| Manager | Lone Wolf Holdings, LLC |
| Manager | Global Equity Strategies, LLC |
| PARTNER | Legal Strategies & Consulting, P.L. |
| Manager | J & G Property Management, LLC |
| Manager | J & G Holdings of Sarasota, LLC |
| Manager | Whiskey J. Holdings, LLC |
| Manager | Honey Badger Holdings, LLC |
| Manager | Steube Real Estate Holdings, LLC |
| State Senator | State of Florida |

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|---------------|--|---|
| August 2017 | REPRESENTATION AGREEMENT BETWEEN ME AND OTHER BUSINESS | PAID COMMISSION BASED ON WORK ENGAGED IN PRIOR TO ENTRING CONGRESS. ANY INCOME ACCOUNTED FOR THROUGH LEGAL STRATEGIES & CONSULTING, P.L. NAME OF BUSINESS PROTECTED BY ATTORNEY CLIENT PRIVILEGE. (RULES REGULATING THE FLORIDA BAR, 4-1.6) |
| November 2010 | FLORIDA STATE PENSION AND ME | I PARTICIPATE IN A DEFINED BENEFIT PLAN IN THE STATE OF FLORIDA DUE TO MY SERVICE THERE. |

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

| Source (Name and Address) | Brief Description of Duties |
|---|---|
| Certain Confidential clients are not reported (Sarasota, FL, US) | Rules Regulating the Florida Bar, 4-1.6 |

SCHEDULE A ASSET CLASS DETAILS

- INVESTMENT (Owner: SP)
LOCATION: US
- IRA (Owner: SP)
- Roth IRA
- SEP IRA
- STOCK PLAN (Owner: SP)
LOCATION: US
- WG GLOBAL ENTERPRISES LLC (Owner: JT)
LOCATION: US
DESCRIPTION: HOLDING COMPANY

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: Hon. W. Greg Steube , 08/13/2019