



Filing ID #10031111

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Masroor Ahmad Adnan  
**Status:** Congressional Candidate  
**State/District:** TX17

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2019  
**Filing Date:** 01/31/2020  
**Period Covered:** 01/01/2019– 01/5/2020

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameriprise Financial Certificate [BA]		\$1,001 - \$15,000	Interest	None	\$1 - \$200
Amplify Credit Union Bank Accounts [BA]		\$100,001 - \$250,000	Interest	None	\$1 - \$200
Bitcoin Cryptocurrency [OT]		\$15,001 - \$50,000	Dividends	None	\$5,001 - \$15,000
DESCRIPTION: Virtual currency					
Individual - NQ ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$15,001 - \$50,000	None		
Individual - NQ ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	None		
Individual - NQ ⇒ Amazon.com, Inc. (AMZN) [ST]		\$15,001 - \$50,000	None		
Individual - NQ ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Individual - NQ ⇒ Blackrock Strategic Muni Opps Inst (MAMTX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Individual - NQ ⇒ Charlotte's Web Holdings Inc (CWBHF) [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Publicly Traded Stock					
Individual - NQ ⇒ Facebook, Inc. - Class A (FB) [ST]		\$1,001 - \$15,000	None		
Individual - NQ ⇒ Ishares Trust Core S&P SCP ETF (IJR) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Individual - NQ ⇒ Mainstay High Yeild Muni Bond I (MMHIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Individual - NQ ⇒ Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Individual - NQ ⇒ MFS Intl Value I (MINIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Individual - NQ ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Individual - NQ ⇒ Morgan Stanely Intl Advantage I (MFAIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Individual - NQ ⇒ Netflix, Inc. (NFLX) [ST]		\$15,001 - \$50,000	None		
Individual - NQ ⇒ OrthoPediatics Corp. (KIDS) [ST]		\$1,001 - \$15,000	None		
Individual - NQ ⇒ PayPal Holdings, Inc. (PYPL) [ST]		\$1,001 - \$15,000	None		
Individual - NQ ⇒ Proofpoint, Inc. (PFPT) [ST]		\$1,001 - \$15,000	None		
Individual - NQ ⇒ Roku, Inc. - Class A (ROKU) [ST]		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Individual - NQ ⇒ Select Sector SPDR Trust (XLY) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Individual - NQ ⇒ Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST]		\$15,001 - \$50,000	None		
Individual - NQ ⇒ SPDR Series Trust SSFA US LRG ETF (LGLV) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
Individual - NQ ⇒ Square, Inc. Class A (SQ) [ST]		\$1,001 - \$15,000	None		
Individual - NQ ⇒ T Rowe Price Health SCIS Investor (PRHSX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$201 - \$1,000
Individual - NQ ⇒ Vangaurd Small Cap ETF (VB) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Individual - NQ ⇒ Vanguard Total STK MKT ETF (VTI) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	None	\$201 - \$1,000
Individual - NQ ⇒ Virtus Kar Sm Cap Growth I (PXSGX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$1 - \$200
Individual - NQ ⇒ Visa Inc. (V) [ST]		\$15,001 - \$50,000	Dividends	None	\$1 - \$200
IRA - VA - 1 ⇒ VP Mod Aggressive Cl4 [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA - VA - 2 ⇒ VP Aggressive Cl4 [MF]		\$50,001 - \$100,000	Tax-Deferred		
Lugal LLC, 100% Interest [BA]		\$1,001 - \$15,000	Interest	None	\$1 - \$200
DESCRIPTION: A 100-percent interest in an LLC established to hold investments.					
Lugal LLC ⇒ Rental Property 2 [RP]		\$500,001 - \$1,000,000	Rent	None	\$15,001 - \$50,000
LOCATION: Austin, TX, US					
My Financial Aurora, LLC, 100% Interest [OL]		\$50,001 - \$100,000	Dividends, Interest	None	\$100,001 - \$1,000,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Austin, TX, US					
DESCRIPTION: 100-percent interest in an LLC engaged in financial advisory services. See Schedule C for Earned Income.					
Rental Property 1 [RP]		\$100,001 - \$250,000	Rent	None	\$1,001 - \$2,500
LOCATION: Austin, TX, US					
Riversource Variable Life ⇒ COL BP Balanc Fd Cl3 [MF]		\$1,001 - \$15,000	None		
Riversource Variable Life ⇒ COL Hgh Yld Bd Cl3 [MF]		\$1,001 - \$15,000	None		
Riversource Variable Life ⇒ Fixed Interest Fund [BA]		\$1,001 - \$15,000	None		
Riversource Variable Life ⇒ Jan Hen Glb Tch Prt SS [MF]		\$1,001 - \$15,000	None		
Riversource Variable Life ⇒ MFS VIT New Discovery [MF]		\$1,001 - \$15,000	None		
Riversource Variable Life ⇒ Pimco VIT All Asset [MF]		\$1,001 - \$15,000	None		
Riversource Variable Life ⇒ Putnam VT Hlth Car IB [MF]		\$1,001 - \$15,000	None		
Riversource Variable Life ⇒ VP Aggressive Cl2 [MF]		\$1,001 - \$15,000	None		
Roth IRA - 1 ⇒ Artisan Funds Intl SM-MID INST (APHJX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - 1 ⇒ Baidu, Inc. - American Depositary Shares, each representing one tenth Class A ordinary share (BIDU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - 1 ⇒ Invesco Fund Oppnhm Intl Sm-Mid (OSMYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - 1 ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA - 1 ⇒ PIMCO Investments INCOME INST (PIMIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - 1 ⇒ Restaurant Brands International Inc. Common Shares (QSR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - 1 ⇒ Vaneck Vectors Morningstar (MOAT) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - 2 ⇒ Legg Mason Funds Clearbridge Select I (LBFIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - 2 ⇒ Morgan Stanley Inst Funds Growth 1 (MSEQX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - 2 ⇒ Morgan Stanley Inst Funds Intl Opp I (MIOIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - 2 ⇒ Salesforce.com Inc (CRM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - 2 ⇒ Schwab Strategic TR MID-CAP ETF (SCHM) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - 2 ⇒ Virtus Funds Kar Sm Cap Growth I (PXSGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA - VA ⇒ VP Aggressive CI2 [MF]		\$15,001 - \$50,000	Tax-Deferred		

\* 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
My Financial Aurora, LLC	Salary	\$ .00	\$90,803.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Capital CDC	October 2012	Mortgage on Rental Property 2	\$100,001 - \$250,000
	R Bank	October 2012	Mortgage on Rental Property 2	\$100,001 - \$250,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Managing Director	Lugal, LLC

### SCHEDULE F: AGREEMENTS

None disclosed.

### 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>Individual - NQ LOCATION: US</li> <li>IRA - VA - 1</li> <li>IRA - VA - 2</li> <li>Lugal LLC (100% Interest) DESCRIPTION: A 100-percent interest in an LLC established to hold investments.</li> <li>Riversource Variable Life</li> <li>Roth IRA - 1</li> <li>Roth IRA - 2</li> <li>Roth IRA - VA</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

## **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:** Masroor Ahmad Adnan , 01/31/2020