

Name: Jason Isaac FINANCIAL DISCLOSURE STATEMENT UNITED STATES HOUSE OF REPRESENTATIVES X U.S. House of Representatives Candidates - Date of Election: 3/6/18 Employing Office: New Officer or Employee New Member of or Candidate for State: TX District: Shared 21 Staff Filer Type (If Applicable): Daytime Telephone: For New Members, Candidates, and New Employees Principal Assistant FORM B Period Covered: January 1, 2017 to January 2, 2018 Check if Amendment A \$200 penalty shall be assessed against any individual who files more than 30 days late. OM HOLD TO THE HISTORY (Office Use Only) LEGISLATIVE RESOURCE CENTER 18 FEB -1 AM 10: 58 Page 1 of 8

PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

FILER STATUS

	THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE	NLY THE SCHEDULE	THIS FORM INCLUDES OF
	ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"	CORRESPONDING SC	ATTACH THE
Yes X No	J. Did you receive compensation of more than \$5,000 from a single source in the current year and two prior years?	Yes X No	D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?
Yes X No	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?	Yes X No	C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?
Yes X No	E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	Yes X No	A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <u>or</u> b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER BOTH OF THESE QUESTIONS

TRUSTS - Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you exclusion this report details of such a trust that benefits you, your spouse, or dependent child?	u excluded Yes	No X
EXEMPTION - Have you excluded from this report any other assets, "unearned" income, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.	e tests for Yes	No X

SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Jason Isaac Page 2 of &

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		Pioneer Bank Savings Accounts	Q2 Holdings Inc, Stock (QTWO)	(Bullard, TX)	l	Examples: Simon & Schuster	Mega Corp Stock	For a detailed discussion of Schedule A requirements, please refer to the instruction booklet.	If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent shid (DC), or jointly held with anyone (JT), in the optional column on the far left.	ff you have a privately-traded fund that is an Excepted investment Fund, please check the "EIF" box.	Exclude: Your personal residence, including second tomes and vacation homes (unless there was rental nomes and vacation terporting period); and any financial income during the reporting period); and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan.	For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.	For rental and other real property held for investment, provide a complete address or description, e.g., rental property," and a city and state.	or beam white the cost exceeds, locally entire that is one of entire that is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts.	count that exceeds the reporting thresholds.	For all IRAs and other retirement plans (such as 401(k) plans) provide the value for each asset held in	Provide complete names of stocks and mutual funds (do not use only ticker symbols).	exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or source of income which generated more than \$200 in uneamed income during the year.	fy (a) each asset held for investment or ction of income and with a fair market value	Assets and/or Income Sources	BLOCK A
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	<u> </u>				×	1			-\$500,000								*Column M is for assets held by your spouse or dependent child in which you have no interest.	specify the method used. If an asset was sold during the reporting period and is included only because it generated income, the value should be 'None.'	Indicate value of asset at close of the reporting period. If you use a valuation method other than fair market value, blease	Value of Asset	ВГОСК В
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SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Jason Isaac

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Eaton Personal Pension (Fidelity NetBenefits)—See Note 1	Victory Sycamore Small Company Opportunity Fund Class I (VSOIX) -Fidelity Advisor Emerging Markets Fund L Class (FIMK X) -Eaton Vance Atlanta Capital -Eaton Fund Class I (EISMX -Goldman Sachs Small Cap Value Fund Investor Class (GSOIX)	401(k) (Assets Below) -The Hartford Growth Opportunities Fund (HGOTX) -Fidelity Advisor Mid Cap Value Fund Class L(EMPOX) -Invesco Diversified Dividend	ASSET NAME Texas Tuition Promise Fund Educational Savings Accis		BLOCK A Assets and/or income Sources
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				Spouse/DC Income over \$1,000,000*	

SCHEDULE C - EARNED INCOME

Name: Jason Isaac Page 4 of 8

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. government) totaling \$200 or more during the reporting period. For both the filer and filer's spouse, list the source and amount of any honoraria. List only the source for other spouse earned income exceeding \$1,000. See examples below.

INCOME LIMITS and PROHIBITED INCOME: Be advised that the income limit and prohibited income may apply to you after you are on House payroll. The 2016 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$27,495. The 2017 limit is \$27,765. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited for Members and senior staff. EXCLUDE: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

Source (include date of receipt for homerstic)	Time		Amount
Cource (iliciade date of leceipt for Horsolatia)	- Jybe	Current Year to Filing	Preceding Year
ABC Trade Association, Baltimore, MD (July 15)	Honorarium	\$0	\$500
Examples: State of Maryland	Salary	\$20,000	\$76,000
Ļ	Spouse Salary	N/A	\$1,000 N/A
Austin Lacrosse Academy dba TexasLacrosse.com	Salary	0	\$7,200
Velocity Elevation LLC	Salary	\$2,000	\$142,000
Texas House of Representatives	Salary, Per Diem	\$600	\$34,246.18
Arbonne	Spouse Salary	N/A	N/A
Carrie Isaac DBA Your Best Temple	Spouse Salary	N/A	N/A

SCHEDULE D - LIABILITIES

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exceeded \$10,000. Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. New Members: Members are required to report all liabilities secured by reat property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period *Column K is for liabilities held solely by your spouse or dependent child.

									Amount of Liability	t of Li	bility				
			Date		>	₽.	c	Q	Е	TI	ø	Ι	_	٠	*
s _P , Dc, л		Creditor	Liability Incurred MO/YR	Type of Liability	\$10,001- \$15,000	\$15,001- \$50,000	\$50,001- \$100,000	\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,001- \$25,000,000	\$25,000,001- \$50,000,000	Over \$50,000,000	Over \$1,000,000* (Spouse/DC Liability)
	Example	First Bank of Wilmington, DE	5/98	Mortgage on Rental Property, Dover, DE				×							
JT	Austin	Austin Bank (Jacksonville, TX)	8/04	Mortgage on Residential Lot, Bullard, TX		X									·
JT	Bank o	Bank of America	1/18	Credit Card	X										
JT	Chase Bank	Bank	1/18	Credit Card		X									
JT	Robert	Robert Seale III (Dripping Springs, TX) 12/16	12/16	Personal Loan		×									
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SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. New Members and second-year candidates report positions held in the reporting period and the current calendar year. First-year candidates and new employees report positions held in the current calendar year and two previous years.

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Position	Name of Organization
Member/President	Texas Natural Gas Foundation
Member/President	US Natural Gas Foundation
Member/President	Digital Education & Work Initiative of Texas
Treasurer	Central Texas Youth Lacrosse Association
Director	Austin Lacrosse Academy, LLC dba TexasLacrosse.com

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SCHEDULE E - POSITIONS (Continued)

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fratemal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. New Members and second-year candidates report positions held in the reporting period and the current calendar year. First-year candidates and new employees report positions held in the current calendar year and two previous years.

Position	Name of Organization
Director	Velocity Elevation, LLC
Non-Voting Legislative Member	Capital Area Council of Governments - CAPCOG

SCHEDULE F - AGREEMENTS

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Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former

Date	Parties to Agreement	Terms of Agreement
66/9	Eaton Personal Pension Account (Fidelity NetBenefits)	Eaton Personal Pension Account (Fidelity NetBenefits) Estimated pension of \$332.26 per month based on an assumed retirement date of 1/1/37

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

Report sources of compensation received by you or your business affiliation for services provided directly by you during the current year and two prior years. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise if you directly provided the services generating a fee or payment of more than \$5,000. Exclude: Payments by the U.S. government and any information considered confidential as a result of a privileged relationship recognized by law. Do not repeat information listed on Schedule C.

Social pair and	ally Bilolliation considered confidential as a result of	government and any monitorinal construction as a result of a privilegical transfer by the resolution of the resolution o
	Source (Name and City/State)	Brief Description of Duties
Ехатрів:	Doe Jones & Smith, Hometown, Homestate	Accounting Services
Doucet & /	Doucet & Associates (Austin, TX)	Business Consulting Services
Ruckit Inc	Ruckit Inc (Houston, TX)	Business Consulting Services
Clean Scar	Clean Scapes LP (Austin, TX)	Business Consulting Services

FILER NOTES (Optional)

Name: Jason Isaac

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						<u></u>	NOTE NUMBER
						This asset is a traditional pension and has also been listed in Schedule F. The value provided is an estimate based on anticipated payments and there are no underlying assets.	NOTES