



Filing ID #10052966

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Don Carlson
Status: Congressional Candidate
State/District: RI01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 08/3/2023
Period Covered: 01/01/2022– 04/30/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Acronym Venture Capital Fund I LLC - Series K ⇒ Kito/Sunniva Caffè (Super Coffee) [OT]		\$250,001 - \$500,000	None		
DESCRIPTION: Production and sales of coffee beverage products.					
Acronym Venture Capital Fund I LLC - Series P ⇒ Penny Ai Tech [OT]		\$250,001 - \$500,000	Investment	None	\$1,001 - \$2,500
DESCRIPTION: Production of software that helps sales consultants to interact with customers and automate sales workflows.					
Bank Newport Savings [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Boulder Ventures LLC ⇒ Boulder Ventures - Checking Account [BA]		\$100,001 - \$250,000	None		
Boulder Ventures LLC ⇒ Boulder Ventures - Savings Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Boulder Ventures LLC ⇒ EAS IP, LLC, 2% Interest [OL]		\$100,001 - \$250,000	None		
LOCATION: Charlottesville, VA, US					
DESCRIPTION: Safety devices for underground pipelines					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Boulder Ventures LLC ⇒ MissionPoint OptiRTC Fund, 60% Interest [OL] LOCATION: Fairfield, CT, US DESCRIPTION: Investment Company		\$15,001 - \$50,000	None		
Boulder Ventures LLC ⇒ Wunder Capital V LLC [OL] LOCATION: Boulder, CO, US DESCRIPTION: Provider of Solar Energy for commercial and industrial real estate.		None	None		
Boulder Ventures LLC ⇒ Broadscale Group LLC ⇒ Broadscale RT Investors LP, 4% Interest [OL] LOCATION: New York, NY, US DESCRIPTION: Investment Company		\$250,001 - \$500,000	None		
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ AgentIQ [OT] DESCRIPTION: Digital platform to improve communication and engagement between financial institutions and their customers.		\$15,001 - \$50,000	None		
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Canary Technologies [OT] DESCRIPTION: Hospitality technology that provides hoteliers with easy, intuitive, and secure solutions to help hotels provide an ideal guest experience.		\$50,001 - \$100,000	None		
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Carpe (Clutch Inc) [OT] DESCRIPTION: Antiperspirant company		\$15,001 - \$50,000	None		
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Confiant [OT] DESCRIPTION: Ad security to stop and detect malware attacks.		\$15,001 - \$50,000	None		
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Crafty [OT] DESCRIPTION: Provides a platform for workplaces to manage food, beverages and supplies for their in-office, remote and hybrid teams.		\$15,001 - \$50,000	None		
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Daily Harvest [OT] DESCRIPTION: Delivery and creation of chef inspired meals.		\$250,001 - \$500,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Easyknock [OT]		\$50,001 - \$100,000	None		
DESCRIPTION: Real estate technology company helping customers convert their equity to cash through sale-leaseback programs.					
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Easyship [OT]		\$50,001 - \$100,000	None		
DESCRIPTION: Shipping platform the provides cloud shipping software solution for eCommerce merchants.					
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Envoy America [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Hospital and home health care services					
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Humi [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Cloud based Human resource software solutions.					
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Ingest [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Data management and analytics for restaurants.					
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Kito/Sunniva Caffè (Super Coffee) [OT]		\$250,001 - \$500,000	None		
DESCRIPTION: Production and sales of coffee beverage products.					
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Maestro [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Technology consulting with custom software, infrastructure services, managed platforms, and product development.					
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ MapMyCustomers [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: CRM mapping software is a specialized tool that helps you see your team's data visually and geographically					
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ NexHealth [OT]		\$250,001 - \$500,000	None		
DESCRIPTION: Patient experience management platform in the healthcare field.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Nylas [OT] DESCRIPTION: Software that securely powers email, calendar, and contacts integrations.		\$15,001 - \$50,000	None		
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Penny Ai Tech [OT] DESCRIPTION: Production of software that helps sales consultants to interact with customers and automate sales workflows.		\$100,001 - \$250,000	None		
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Student Loans Genius/Vault [OT] DESCRIPTION: Software platform for student loan benefit and financial wellness program.		\$1,001 - \$15,000	None		
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder ⇒ Zylotech - Terminus Shares [OT] DESCRIPTION: Account based marketing for revenue growth.		\$1 - \$1,000	None		
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series L - Boulder ⇒ Confiant [OT] DESCRIPTION: Ad security to stop and detect malware attacks.		\$50,001 - \$100,000	None		
Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series M - Boulder ⇒ Kito/Sunniva Caffè (Super Coffee) [OT] DESCRIPTION: Production and sales of coffee beverage products.		\$1,000,001 - \$5,000,000	None		
Broadscale Group LLC ⇒ Broadscale PT Investors LP, 1% Interest [OL] LOCATION: New York, NY, US DESCRIPTION: Electric vehicle technology manufacturer		None	None		
Capital Group American Funds [5P] LOCATION: RI		\$100,001 - \$250,000	Tax-Deferred		
Capshift LLC [OL] LOCATION: Fairfield, CT, US DESCRIPTION: Impact investing in financial and philanthropic institutions		\$1,001 - \$15,000	Investment	\$201 - \$1,000	\$201 - \$1,000
Carlson Consulting Inc., 100% Interest [OL]		None	Self-Employed	None	\$100,001 - \$1,000,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Jamestown, RI, US					
DESCRIPTION: Business consulting for negotiation workshops, leadership seminars, management assessments, and family businesses.					
Citibank Checking [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Citibank Savings [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Ethereum [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Native cryptocurrency and digital currency used to pay for certain activities.					
Fidelity Brokerage ⇒ Archer Aviation Inc. Class A (ACHR) [ST]		\$15,001 - \$50,000	None		
Fidelity Brokerage ⇒ Enphase Energy, Inc. (ENPH) [ST]		None	Capital Gains	None	\$15,001 - \$50,000
Fidelity Brokerage ⇒ Fidelity Government Money Market [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Fidelity Brokerage ⇒ JP Morgan CD [BA]		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	None
Fidelity Brokerage ⇒ Moderna, Inc. (MRNA) [ST]		\$15,001 - \$50,000	None		
Fidelity Brokerage ⇒ Proterra Inc (PTRA) [ST]		\$15,001 - \$50,000	None		
Fidelity Brokerage ⇒ Wells Fargo CD [BA]		\$100,001 - \$250,000	Interest	None	\$1 - \$200
Fidelity Roth IRA ⇒ Archer Aviation Inc. Class A (ACHR) [ST]		\$15,001 - \$50,000	None		
Fidelity Roth IRA ⇒ Citibank IRA [IH]		None	None		
Fidelity Roth IRA ⇒ Enphase Energy, Inc. (ENPH) [ST]		\$50,001 - \$100,000	None		
Fidelity Roth IRA ⇒ Generac Holdings Inc. (GNRC) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Roth IRA ⇒ Moderna, Inc. (MRNA) [ST]		\$1,001 - \$15,000	None		
Fidelity Roth IRA ⇒ Proterra Inc (PTRA) [ST]		\$1,001 - \$15,000	None		
Fidelity Roth IRA ⇒ Truist Bank IRA [IH]		\$1 - \$1,000	None		
Fidelity SEP-401K ⇒ Apple Inc. (AAPL) [ST]		\$250,001 - \$500,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Fidelity SEP-401K ⇒ Fidelity Government Cash Reserves [BA]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
Fidelity SEP-401K ⇒ Generac Holdings Inc. (GNRC) [ST]		\$15,001 - \$50,000	None		
Fidelity SEP-401K ⇒ Marriott International - Class A (MAR) [ST]		None	Capital Gains, Dividends	\$15,001 - \$50,000	\$1,001 - \$2,500
Fidelity SEP-401K ⇒ Simplify U.S. Equity PLUS GBTC ETF (SPBC) [ST]		\$1,001 - \$15,000	None		
Fidelity SEP-401K ⇒ Tesla, Inc. (TSLA) [ST]		\$100,001 - \$250,000	Capital Gains	None	\$100,001 - \$1,000,000
Georgetown Alumni Angels Fund I, LLC Series A ⇒ AgentIQ [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Digital platform to improve communication and engagement between financial institutions and their customers.					
Georgetown Alumni Angels Fund I, LLC Series A ⇒ Backplane [OT]		\$1 - \$1,000	None		
DESCRIPTION: Platform that allows like-minded people to connect across their shared interests.					
Georgetown Alumni Angels Fund I, LLC Series A ⇒ Bit Armor, AG (Privus) [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Secure video conferencing					
Georgetown Alumni Angels Fund I, LLC Series A ⇒ Boom Shakalaka [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Video game software company					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Georgetown Alumni Angels Fund I, LLC Series A ⇒ Canvs.TV [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Insights platform for analyzing open-ended text from virtually any source, including surveys, customer reviews and social media.					
Georgetown Alumni Angels Fund I, LLC Series A ⇒ Carpe (Clutch Inc) [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Antiperspirant company					
Georgetown Alumni Angels Fund I, LLC Series A ⇒ Daily Harvest [OT]		\$100,001 - \$250,000	None		
DESCRIPTION: Delivery and creation of chef inspired meals.					
Georgetown Alumni Angels Fund I, LLC Series A ⇒ LISNR [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Ultrasonic data transmission company					
Georgetown Alumni Angels Fund I, LLC Series A ⇒ Maestro [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Technology consulting with custom software, infrastructure services, managed platforms, and product development.					
Georgetown Alumni Angels Fund I, LLC Series A ⇒ Partender [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Bar inventory software					
Georgetown Alumni Angels Fund I, LLC Series A ⇒ Sourcery (Restaurant Cheetah) [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Restaurant supply app					
Georgetown Alumni Angels Fund I, LLC Series A ⇒ Superhuman [OT]		\$100,001 - \$250,000	None		
DESCRIPTION: Email platform to improve productivity.					
Georgetown Alumni Angels Fund I, LLC Series A ⇒ TrueAnthem [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: AI-Powered Content Distribution Platform for publishers and media companies.					
Georgetown Alumni Angels Fund I, LLC Series F ⇒ Backplane [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Platform that allows like-minded people to connect across their shared interests.					
Greenlight II, LLC, 1% Interest [OL]		\$1 - \$1,000	Investment	\$1 - \$200	\$1 - \$200
LOCATION: Charlottesville, VA, US					
DESCRIPTION: Installation and facilitation for energy efficiency					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rejects Beer Co, LLC, 4% Interest [OL]		\$15,001 - \$50,000	Investment	\$2,501 - \$5,000	\$2,501 - \$5,000
LOCATION: Middletown, RI, US DESCRIPTION: Local Craft Brewery					
Rubicon Venture Capital II, Series A ⇒ AgentIQ [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Digital platform to improve communication and engagement between financial institutions and their customers.					
Rubicon Venture Capital II, Series A ⇒ Canary Technologies [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Hospitality technology that provides hoteliers with easy, intuitive, and secure solutions to help hotels provide an ideal guest experience.					
Rubicon Venture Capital II, Series A ⇒ Carpe (Clutch Inc) [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Antiperspirant company					
Rubicon Venture Capital II, Series A ⇒ Confiant [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Ad security to stop and detect malware attacks.					
Rubicon Venture Capital II, Series A ⇒ Crafty [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Provides a platform for workplaces to manage food, beverages and supplies for their in-office, remote and hybrid teams.					
Rubicon Venture Capital II, Series A ⇒ Daily Harvest [OT]		\$100,001 - \$250,000	None		
DESCRIPTION: Delivery and creation of chef created foods					
Rubicon Venture Capital II, Series A ⇒ Easyknock [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Real estate technology company helping customers convert their equity to cash through sale-leaseback programs.					
Rubicon Venture Capital II, Series A ⇒ Easyship [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Shipping platform the provides cloud shipping software solution for eCommerce merchants.					
Rubicon Venture Capital II, Series A ⇒ Envoy America [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Hospital and home health care services					
Rubicon Venture Capital II, Series A ⇒ Humi [OT]		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Cloud based Human resource software solutions.					
Rubicon Venture Capital II, Series A ⇒ Ingest [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Data management and analytics for restaurants.					
Rubicon Venture Capital II, Series A ⇒ Kito/Sunniva Caffè (Super Coffee) [OT]		\$100,001 - \$250,000	None		
DESCRIPTION: Production and sales of coffee beverage products.					
Rubicon Venture Capital II, Series A ⇒ Maestro [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Technology consulting with custom software, infrastructure services, managed platforms, and product development.					
Rubicon Venture Capital II, Series A ⇒ MapMyCustomers [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: CRM mapping software is a specialized tool that helps you see your team's data visually and geographically.					
Rubicon Venture Capital II, Series A ⇒ NexHealth [OT]		\$250,001 - \$500,000	None		
DESCRIPTION: Patient experience management platform in the healthcare field.					
Rubicon Venture Capital II, Series A ⇒ Nylas [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Software that securely powers email, calendar, and contacts integrations.					
Rubicon Venture Capital II, Series A ⇒ Penny Ai Tech [OT]		\$50,001 - \$100,000	None		
DESCRIPTION: Production of software that helps sales consultants to interact with customers and automate sales workflows.					
Rubicon Venture Capital II, Series A ⇒ Student Loans Genius/Vault [OT]		\$1,001 - \$15,000	None		
DESCRIPTION: Software platform for student loan benefit and financial wellness program.					
Rubicon Venture Capital II, Series A ⇒ Zylotech - Terminus Shares [OT]		\$1 - \$1,000	None		
DESCRIPTION: Account based marketing for revenue growth.					
TCM Bayview LLC, 6% Interest [OL]		\$250,001 - \$500,000	Investment	\$1,001 - \$2,500	\$5,001 - \$15,000
LOCATION: Beachwood, OH, US DESCRIPTION: Mixed use commercial property					
TCM Capital Plaza, LLC, 6% Interest [OL]		\$250,001 - \$500,000	Investment	\$5,001 - \$15,000	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Beachwood, OH, US DESCRIPTION: Mixed use commercial property					
TCM Johns Creek, 14% Interest [OL]		\$100,001 - \$250,000	Investment	\$2,501 - \$5,000	None
LOCATION: Beachwood, OH, US DESCRIPTION: Mixed use commercial property					
TCM Peachtree LLC, 4% Interest [OL]		\$100,001 - \$250,000	None		
LOCATION: Beachwood, OH, US DESCRIPTION: Mixed use commercial property					
TCM Technology Park, LLC, 3% Interest [OL]		\$250,001 - \$500,000	Investment	\$2,501 - \$5,000	None
LOCATION: Beachwood, OH, US DESCRIPTION: Mixed use commercial property					
The Looma Project [OL]		\$500,001 - \$1,000,000	Interest, Investment	\$2,501 - \$5,000	\$2,501 - \$5,000
LOCATION: Raleigh, NC, US DESCRIPTION: Produces in-store media platform connecting shoppers to the stories and education behind the products.					
Whitehall Street Global Employee Fund 2001, L.P. [HE]		\$1,001 - \$15,000	None		
Wunder Capital IV LLC [OL]		\$15,001 - \$50,000	Investment	\$2,501 - \$5,000	\$2,501 - \$5,000
LOCATION: Boulder, CO, US DESCRIPTION: Provider of Solar Energy for commercial and industrial real estate.					

* 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
Yale University	Salary	\$116,666.68	\$195,741.74
Carlson Consulting Inc.	Salary	\$.00	\$43,636.35

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
President	Carlson Consulting Inc.
Managing Member	Boulder Ventures, 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
Lansberg, Gersick Associates, L.L.C (Branford, CT, US)	Business consulting relating to governance and dynamics

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">◦ Acronym Venture Capital Fund I LLC - Series K (9% Interest) LOCATION: US◦ Acronym Venture Capital Fund I LLC - Series P (4% Interest) LOCATION: US◦ Boulder Ventures LLC (100% Interest) LOCATION: US◦ Boulder Ventures LLC ⇒ Broadscale Group LLC (4% Interest) LOCATION: US DESCRIPTION: Broadscale invests in industry leading corporations.◦ Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series A - Boulder (7% Interest) LOCATION: US◦ Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series L - Boulder (87% Interest) LOCATION: US◦ Boulder Ventures LLC ⇒ Rubicon Venture Capital II, Series M - Boulder (100% Interest) LOCATION: US◦ Broadscale Group LLC LOCATION: US DESCRIPTION: Broadscale invests in industry leading corporations.◦ Fidelity Brokerage LOCATION: US◦ Fidelity Roth IRA◦ Fidelity SEP-401K◦ Georgetown Alumni Angels Fund I, LLC Series A (3% Interest) LOCATION: US

- Georgetown Alumni Angels Fund I, LLC Series F (36% Interest)
LOCATION: US
- Rubicon Venture Capital II, Series A (3% Interest)
LOCATION: US

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: Don Carlson , 08/3/2023