



Filing ID #10056884

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Dr. Johnny Olszewski Jr.
Status: Congressional Candidate
State/District: MD02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 04/6/2024
Period Covered: 01/01/2023– 03/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Baltimore County Government Retirement [PE] DESCRIPTION: From service to the Baltimore County Government. Value determined at retirement.		Undetermined	None		
Baltimore County Supplemental Retirement Plan ⇒ Fidelity Puritan Fund (FPURX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Baltimore County Supplemental Retirement Plan ⇒ JP Morgan Mid Cap Value Fund-A Share Class (JAMCX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Baltimore County Supplemental Retirement Plan ⇒ Nationwide Destination 2050 Fund Class R6 (NWOIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Baltimore County Supplemental Retirement Plan ⇒ Nationwide Destination 2055 Fund Class R6 (NTDIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Baltimore County Supplemental Retirement Plan ⇒ Nationwide Variable Insurance Trust - NVIT Multi-Manager Small Company Fund: Class I [OT] DESCRIPTION: Mutual Fund not listed.		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Baltimore County Supplemental Retirement Plan ⇒ T. Rowe Price Equity Income Fund - I Class (REIPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Bank of America Account [BA] DESCRIPTION: Savings and Checking Accounts	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Clover Health Investments, Corp. - Class A Common stock (CLOV) [ST]		\$1,001 - \$15,000	None		
Daria J. Olszewski Irrevocable Trust ⇒ Quantitative Investment Management TAG II [HE]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$1,001 - \$2,500
Democratic Large Cap Core ETF (DEMZ) [EF]		\$1,001 - \$15,000	None		
DraftKings Inc. - Class A Common Stock (DKNG) [ST]		\$1,001 - \$15,000	None		
Fidelity Investment Retirement Account ⇒ Fidelity Select Technology (FSPTX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investment Retirement Account ⇒ Fundamental Investors, Class R-6 Shares (RFNGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investment Retirement Account ⇒ JPMCB SmartRetirement® Passive Blend 2045 Fund CF-B [HE]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Investment Retirement Account ⇒ Neuberger Berman Genesis Fd Cl R6 (NRGSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investment Retirement Account ⇒ T. Rowe Price Growth Stock ETF (TGRW) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investment Retirement Account ⇒ Vanguard Institutional 500 Index Trust [HE]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Investment Retirement Account ⇒ Vanguard Mid-Cap Index Fund Insti Plus (VMCPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
General Electric Company Common Stock (GE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Howard County Retirement [PE] DESCRIPTION: Pension of spouse from her time working in Howard County Recreation and Parks. Value determined at retirement.	SP	Undetermined	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
M and T Bank Accounts [BA] DESCRIPTION: Checking, Savings and CD accounts.		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$1 - \$200
Maryland Legislative Retirement Plan [PE] DESCRIPTION: From service in the Maryland General Assembly. Value determined at retirement.		Undetermined	None		
Maryland Prepaid College Trust [5P] LOCATION: MD DESCRIPTION: Asset receives an annual payment towards this prepaid trust program.		\$1,001 - \$15,000	None		
Maryland Senator Edward J. Kasemeyer College Investment Plan 1 ⇒ Balanced Portfolio [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 1 ⇒ Portfolio 2033 [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 1 ⇒ T. Rowe Price Equity Index 500 Portfolio (QAAGTX) [MF]		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 2 ⇒ Balanced Portfolio [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 2 ⇒ Equity Portfolio [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 2 ⇒ Portfolio 2027 [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 3 ⇒ Balanced Portfolio [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Maryland Senator Edward J. Kasemeyer College Investment Plan 3 ⇒ Equity Index 500 Portfolio [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 3 ⇒ Equity Portfolio [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 3 ⇒ Global Equity Mkt Index Port [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 3 ⇒ Portfolio 2039 [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 4 ⇒ Balanced Portfolio [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 4 ⇒ Portfolio 2030 [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 5 ⇒ Balanced Portfolio [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 5 ⇒ Equity Portfolio [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 5 ⇒ Portfolio 2036 [5F] LOCATION: MD		\$1 - \$1,000	Tax-Deferred		
Maryland Senator Edward J. Kasemeyer College Investment Plan 6 ⇒		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Balanced Portfolio [5F]					
LOCATION: MD					
Maryland Senator Edward J. Kasemeyer College Investment Plan 6 ⇒ Equity Index 500 Portfolio [5F]		\$1 - \$1,000	Tax-Deferred		
LOCATION: MD					
Maryland Senator Edward J. Kasemeyer College Investment Plan 6 ⇒ Portfolio 2036 [5F]		\$1 - \$1,000	Tax-Deferred		
LOCATION: MD					
Maryland State Retirement and Pension System [PE]		Undetermined	None		
COMMENTS: Maryland State Teacher Pension program. Value determined at retirement.					
Maryland Supplemental Retirement Plan ⇒ EuroPacific Growth Fund CI R-6 (RERGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Maryland Supplemental Retirement Plan ⇒ Fidelity Puritan Fund (FPURX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Maryland Supplemental Retirement Plan ⇒ Great Gray Trust American Funds 2040 Fund I (WTAAEX) [MF]		\$1 - \$1,000	Tax-Deferred		
Maryland Supplemental Retirement Plan ⇒ Great Gray Trust American Funds 2045 Fund I (WTAAFX) [MF]		\$1 - \$1,000	Tax-Deferred		
Maryland Supplemental Retirement Plan ⇒ State Street S&P 500 Index V.I.S. Fund (SSSPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Maryland Supplemental Retirement Plan ⇒ T. Rowe Price Mid-Cap Value Fund, Inc. (TRMCX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Maryland Supplemental Retirement Plan ⇒ T.Rowe Price Institutional Small-Cap Stock Fund (TRSSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Maryland Supplemental Retirement Plan ⇒ TCW Core Fixed Income Fund I Class (TGCFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Maryland Supplemental Retirement Plan ⇒ William Blair Large Cap Growth Fund Class R6 (LCGJX)		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[MF]					
Quantitative Tactical Aggressive Fund LLC [HE]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	\$2,501 - \$5,000
Vanguard Retirement Portfolio ⇒ DFA U.S. Sustainability Core I Ptf (DFSIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard Retirement Portfolio ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Vanguard Retirement Portfolio ⇒ Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

* Investment vehicle 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
Baltimore County Government	Salary	\$192,000.00	\$192,000.00
COMMENTS: Annual salary for the office of Baltimore County Executive, as established by local code.			
Maryland League of Conservation Voters	Spouse Salary	\$78,508.00	\$65,356.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2018	John Olszewski Jr and Baltimore County Government	Retirement Agreement, to be exercised upon completion of service and upon reaching retirement criteria.
June 2006	John Olszewski Jr and Maryland State Government	Retirement agreement to be executed upon completion of service and reaching retirement criteria.

May 2013	Marisa Olszewski and Howard County Government	Retirement Agreement, to be exercised upon completion of service and upon reaching retirement criteria.
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SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Baltimore County Supplemental Retirement Plan
- Daria J. Olszewski Irrevocable Trust (Owner: DC)
- Fidelity Investment Retirement Account
- Maryland Senator Edward J. Kasemeyer College Investment Plan 1
LOCATION: MD
DESCRIPTION: Plan held for benefit of dependent child
- Maryland Senator Edward J. Kasemeyer College Investment Plan 2
LOCATION: MD
DESCRIPTION: Plan held for the benefit of a non-dependent child
- Maryland Senator Edward J. Kasemeyer College Investment Plan 3
LOCATION: MD
DESCRIPTION: Plan held for the benefit of a non-dependent child
- Maryland Senator Edward J. Kasemeyer College Investment Plan 4
LOCATION: MD
DESCRIPTION: Plan held for the benefit of a non-dependent child
- Maryland Senator Edward J. Kasemeyer College Investment Plan 5
LOCATION: MD
DESCRIPTION: Plan held for the benefit of a non-dependent child
- Maryland Senator Edward J. Kasemeyer College Investment Plan 6
LOCATION: MD
DESCRIPTION: Account held for the benefit of a non-dependent child
- Maryland Supplemental Retirement Plan
- Vanguard Retirement Portfolio (Owner: SP)

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: Dr. Johnny Olszewski Jr., 04/6/2024