



Filing ID #10060104

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Brian Walbridge  
**Status:** Congressional Candidate  
**State/District:** TX<sub>31</sub>

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 05/8/2024  
**Period Covered:** 01/01/2023– 01/5/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Capital One Bank [BA]		\$1 - \$1,000	Interest	None	\$1 - \$200
Discover Bank [BA]	JT	\$1,001 - \$15,000	Interest	None	\$201 - \$1,000
Fidelity HSA ⇒ Ardagh Metal Packaging S.A. Ordinary Shares (AMBP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity HSA ⇒ DARKPULSE INC (DPLS) [ST]		\$1 - \$1,000	Tax-Deferred		
Fidelity HSA ⇒ FDIC Insured Deposit at Fifth Third HSA [BA]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity HSA ⇒ FDIC Insured Deposit at JP Morgan HSA [BA]		\$1 - \$1,000	Tax-Deferred		
Fidelity HSA ⇒ MercadoLibre, Inc. - Common Stock (MELI) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity HSA ⇒ Royal Bank Of Canada Common Stock (RY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity HSA ⇒ Toronto Dominion Bank (TD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity HSA ⇒ Vanguard Extended Duration Treasury ETF (EDV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity HSA ⇒ Vanguard Long-Term Treasury ETF (VGLT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
JP Morgan Chase Bank [BA]	JT	\$1,001 - \$15,000	None		
PCS Retirement 401k ⇒ iShares S&P 500 Index Fund - Class A (BSPAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
PCS Retirement 401k ⇒ JPMorgan Equity Income Fund A (OIEIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
PCS Retirement 401k ⇒ MFS International Value Fund Class R3 (MINGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
PCS Retirement 401k ⇒ Wilmington U.S. Treasury Money Market Fund Select Class (WTEXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Salient River Ventures LLC, 100% Interest [OL]  LOCATION: Leander / Williamson, TX, US DESCRIPTION: Consultant		\$1,001 - \$15,000	Business Income	\$201 - \$1,000	\$201 - \$1,000
U.S. Treasury Series I Savings Bonds [GS]		\$15,001 - \$50,000	Interest	None	\$201 - \$1,000
USAA 529 Education Savings Plan [5F]  LOCATION: TX	DC	\$1,001 - \$15,000	Tax-Deferred		
USAA Federal Savings Bank [BA]	JT	\$1,001 - \$15,000	Interest	None	\$1 - \$200
Vanguard IRA ⇒ abrdrn Physical Silver Shares ETF (SIVR) [EF]		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Vanguard IRA ⇒ Agnico Eagle Mines Limited Common Stock (AEM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Altria Group, Inc. (MO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Archer-Daniels-Midland Company Common Stock (ADM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Ardagh Metal Packaging S.A. Ordinary Shares (AMBP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Atkore Inc. Common Stock (ATKR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Bank of America Corporation Common Stock (BAC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Bank of America Corporation Common Stock (BAC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Barrick Gold Corporation Common Stock (GOLD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Boeing Company (BA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Boeing Company (BA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ British American Tobacco Industries, p.l.c. Common Stock ADR (BTI) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ British American Tobacco Industries, p.l.c. Common Stock		\$1,001 - \$15,000	Tax-Deferred		

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ADR (BTI) [ST]					
Vanguard IRA ⇒ Bunge Limited Common Shares (BG) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Vanguard IRA ⇒ Cheniere Energy, Inc. Common Stock (LNG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Cheniere Energy, Inc. Common Stock (LNG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Chesapeake Energy Corporation (CHK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Chevron Corporation Common Stock (CVX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Coca-Cola Company (KO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Constellation Brands, Inc. Common Stock (STZ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ DARKPULSE INC (DPLS) [ST]		\$1 - \$1,000	Tax-Deferred		
Vanguard IRA ⇒ Deere & Company Common Stock (DE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Deere & Company Common Stock (DE) [ST]	SP	\$1 - \$1,000	Tax-Deferred		
Vanguard IRA ⇒ Devon Energy Corporation Common Stock (DVN) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard IRA ⇒ Enbridge Inc Common Stock (ENB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Enbridge Inc Common Stock (ENB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Ericsson - American Depositary Shares each representing 1 underlying Class B share (ERIC) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard IRA ⇒ Ericsson - American Depositary Shares each representing 1 underlying Class B share (ERIC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Huntington Ingalls Industries, Inc. Common Stock (HII) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Lithium Americas (LAAC) [ST]		\$1 - \$1,000	Tax-Deferred		
Vanguard IRA ⇒ Lithium Americas Corp. Common Shares (LAC) [ST]		\$1 - \$1,000	Tax-Deferred		
Vanguard IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Mondelez International, Inc. - Class A Common Stock (MDLZ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Mondelez International, Inc. - Class A Common Stock (MDLZ) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Northrop Grumman Corporation Common Stock (NOC) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard IRA ⇒ Occidental Petroleum Corporation Common Stock (OXY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Occidental Petroleum Corporation Common Stock (OXY) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Pan American Silver Corp. (PAAS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Pan American Silver Corp. (PAAS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Pfizer, Inc. Common Stock (PFE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ RTX Corporation Common Stock (RTX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ RTX Corporation Common Stock (RTX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Southwestern Energy Company Common Stock (SWN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ SPDR Gold MiniShares Trust (GLDM) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Vanguard Consumer Staples ETF (VDC) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Vanguard Extended Duration Treasury ETF (EDV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Vanguard Federal Money Market Fund [BA]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Vanguard Federal Money Market Fund [BA]					
Vanguard IRA ⇒ Vanguard Long-Term Treasury ETF (VGLT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Vanguard Utilities ETF (VPU) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Walmart Inc. Common Stock (WMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard IRA ⇒ Wheaton Precious Metals Corp Common Shares (WPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Vanguard Joint Brokerage ⇒ Annaly Capital Management Inc. Common Stock (NLY) [ST]	JT	None	Dividends	None	\$201 - \$1,000
Vanguard Joint Brokerage ⇒ Devon Energy Corporation Common Stock (DVN) [ST]	JT	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Vanguard Joint Brokerage ⇒ Vanguard Extended Duration Treasury ETF (EDV) [EF]	JT	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Vanguard Joint Brokerage ⇒ Vanguard Federal Money Market Fund [BA]	JT	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000

\* 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
Hagerty Consulting, Inc.	Salary		\$117,000.00
Salient River Ventures, LLC	Owner / business earnings	\$293.00	\$667.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America	October 2023	Personal Loan	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Consultant	Hagerty Consulting, Inc.
Owner	Salient River Ventures, LLC

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>Fidelity HSA LOCATION: US</li><li>PCS Retirement 401k</li><li>Vanguard IRA</li><li>Vanguard IRA (Owner: SP)</li><li>Vanguard Joint Brokerage (Owner: JT)</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:** Brian Walbridge , 05/8/2024