



Filing ID #10056141

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Jared Bryant Lovelace  
**Status:** Congressional Candidate  
**State/District:** TX10

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2023  
**Filing Date:** 11/3/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset     | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|--------------------|----------------|-------------------------------|-----------------------|
| CREDIT SUISSE COMMODITY RETURN STRATEGY-B [IH]                                       |       | \$1 - \$1,000      | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive income.  |       |                    |                |                               |                       |
| DOMESTIC EQUITY (MSA/DELAWARE)-B [IH]  |       | \$1,001 - \$15,000 | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive income.  |       |                    |                |                               |                       |
| EMERGING MARKTS EQUITY (MSA/ABRDN INVESTMTS LTD)-B [IH]                              |       | \$1,001 - \$15,000 | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive Income.  |       |                    |                |                               |                       |
| FIDELITY VIP CONTRAFUND-B [IH]   |       | \$1,001 - \$15,000 | None           |                               |                       |
| DESCRIPTION: Roth IRA. All dividends reinvested into the account. No passive income. |       |                    |                |                               |                       |
| GLOBAL REAL ESTATE SECURITIES (RUSSELL INVSTS)-B [IH]                                |       | \$1 - \$1,000      | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive income.  |       |                    |                |                               |                       |
| INDEX 400 STOCK (MSA/NORTHERNTRUST INVESTMENTS)-B [IH]                               |       | \$1 - \$1,000      | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive income.  |       |                    |                |                               |                       |
| INDEX 500 STOCK (MSA/BLACKROCK ADVISORS  |       | \$1,001 - \$15,000 | None           |                               |                       |

| Asset  | Owner | Value of Asset      | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|---------------------|----------------|-------------------------------|-----------------------|
| LLC)-B [IH]  |       |                     |                |                               |                       |
| DESCRIPTION: Roth IRA retirement account. All dividends reinvested into the retirement account. This provides zero passive income. |       |                     |                |                               |                       |
| INDEX 600 STOCK (MSA/NORTHERNTRUST INVESTMENTS)-B [IH]   |       | \$1 - \$1,000       | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive income.  |       |                     |                |                               |                       |
| INTERNATIONAL EQUITY (MSA/DODGE AND COX)-B [IH]  |       | \$1,001 - \$15,000  | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive income.  |       |                     |                |                               |                       |
| INTERNATIONAL GROWTH (MSA/FIAM LLC)-B [IH]   |       | \$1,001 - \$15,000  | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive Income.  |       |                     |                |                               |                       |
| MID CAP VALUE (MSA/AMERICAN CENTURY)-B [IH]  |       | \$1 - \$1,000       | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive income.  |       |                     |                |                               |                       |
| NEUBERGER BERMAN SUSTAINABLE EQUITY-B [IH]   |       | \$1 - \$1,000       | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive income.  |       |                     |                |                               |                       |
| RESEARCH INTERNATIONAL CORE (MSA/MFS)-B [IH]   |       | \$1,001 - \$15,000  | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive income.  |       |                     |                |                               |                       |
| SMALL CAP GROWTH STOCK (MSA/WELLINGTON MGMT)-B [IH]  |       | \$1 - \$1,000       | None           |                               |                       |
| DESCRIPTION: Roth IRA. No passive income.  |       |                     |                |                               |                       |
| SWISX [MF]   | DC    | \$1,001 - \$15,000  | Dividends      | \$1 - \$200                   | \$1 - \$200           |
| DESCRIPTION: Publicly traded Schwab mutual fund. Filer is a custodian of these holdings belonging to two of his children.          |       |                     |                |                               |                       |
| SWPPX [MF]   | DC    | \$1,001 - \$15,000  | Dividends      | \$1 - \$200                   | \$1 - \$200           |
| DESCRIPTION: Publicly traded Schwab mutual fund. Filer is a custodian of these holdings belonging to two of his children.          |       |                     |                |                               |                       |
| SWSSX [MF]   | DC    | \$1,001 - \$15,000  | Dividends      | \$1 - \$200                   | \$1 - \$200           |
| DESCRIPTION: Publicly traded Schwab mutual fund. Filer is a custodian of these holdings belonging to two of his children.          |       |                     |                |                               |                       |
| USAA Checking & Savings [BA]   | JT    | \$15,001 - \$50,000 | Interest       | \$1 - \$200                   | \$1 - \$200           |
| DESCRIPTION: Shared checking and savings accounts for myself and my spouse.  |       |                     |                |                               |                       |
| Wells Fargo Checking and Savings Accounts [BA]   |       | \$1,001 - \$15,000  | Interest       | \$1 - \$200                   | None                  |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|-------|-------|----------------|----------------|-------------------------------|-----------------------|
|-------|-------|----------------|----------------|-------------------------------|-----------------------|

DESCRIPTION: Both accounts are interest-bearing.

\* 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 |
|---|--------------------------|-------------------------------|-----------------------|
| ADVON, Inc. (Formerly "Drifter Expeditions, Inc.) | Former Employment Salary | \$17,508.65                   | N/A                   |

COMMENTS: This was income earned as a W2 employee for the startup company that I founded. I worked here full-time after finishing my service in the U.S. Army in May 2023. This company shut down at the end of September 2023 and I no longer receive any income from this company. My candidacy for TX-10 began in October 2023.

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

| Position  | Name of Organization  |
|-----------|-----------------------|
| President | ADVON, Inc.           |
| Secretary | BYU MESA Alumni Board |

COMMENTS: This was a startup company that I founded. It was dissolved in September, 2023.

COMMENTS: I am currently the secretary of the alumni board for the Middle East Studies/Arabic program at Brigham Young University. I am uncompensated for this volunteer position.

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## 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:** Jared Bryant Lovelace , 11/3/2023