



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Daniel McCready
Status: Congressional Candidate
State/District: NC09

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 04/14/2019
Period Covered: 01/01/2018– 03/31/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
College Foundation of North Carolina # 1 ⇒ Aggressive Growth Portfolio (Age-Based) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		
College Foundation of North Carolina # 2 ⇒ Aggressive Growth Portfolio (Age-Based) [MF]	DC	\$50,001 - \$100,000	Tax-Deferred		
College Foundation of North Carolina # 3 ⇒ Aggressive Growth Portfolio (Age-Based) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
College Foundation of North Carolina # 4 ⇒ Aggressive Growth Portfolio (Age-Based) [MF]	DC	\$15,001 - \$50,000	Tax-Deferred		
Dart LLC [OT] DESCRIPTION: Convertible Note- retail digital display start-up		\$15,001 - \$50,000	None		
Davenport & Company LLC - Child # 1 ⇒ Capital Income Builder (CAIBX) [MF]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Davenport & Company LLC - Child # 1 ⇒ Davenport Equity Opportunities (DEOPX) [MF]	DC	\$100,001 - \$250,000	Capital Gains, Dividends	None	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Davenport & Company LLC - Child # 1 ⇒ EuroPacific Growth CL A (AEPGX) [MF]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	None	\$1,001 - \$2,500
Davenport & Company LLC - Child # 2 ⇒ Davenport Equity Opportunities Fund (DEOPX) [MF]	DC	\$100,001 - \$250,000	Capital Gains	None	\$2,501 - \$5,000
Davenport & Company LLC - Child # 3 ⇒ Davenport Equity Opportunities (DEOPX) [MF]	DC	\$50,001 - \$100,000	Capital Gains	None	\$1,001 - \$2,500
Davenport & Company LLC - Child # 4 ⇒ Davenport Equity Opportunities (DEOPX) [MF]	DC	\$15,001 - \$50,000	Capital Gains	None	\$201 - \$1,000
DL Land Ventures, LLC ⇒ Bank of America - Checking [BA]	JT	\$50,001 - \$100,000	None		
DL Land Ventures, LLC ⇒ Investment Property [RP] LOCATION: Rutherford County, NC, US	JT	\$500,001 - \$1,000,000	None		
Double Time Capital Management, LP [OL] LOCATION: Charlotte, NC, US DESCRIPTION: Management Company for clean energy investment firm		\$1,000,001 - \$5,000,000	Partnership Income	None	\$1,000,001 - \$5,000,000
Double Time Capital, LLC [OL] LOCATION: Charlotte, NC, US DESCRIPTION: Clean energy investment firm		\$1,001 - \$15,000	Partnership Income	None	\$5,001 - \$15,000
John G. Rocovich Jr & John T Parker Trust UA 11/01/1989 ⇒ Beneficial Interest - John G. Rocovich Jr & John T Parker Trust UA 11/01/1989 [OT] DESCRIPTION: Trust income distribution	SP	None	Distribution	\$1,001 - \$2,500	\$2,501 - \$5,000
John G. Rocovich Jr & John T Parker Trust UA 11/01/1989 ⇒ Prudential Financial, Inc. (PRU) [ST]	SP	\$100,001 - \$250,000	None		
John G. Rocovich Jr & John T Parker Trust UA 11/01/1989 ⇒ Prudential Whole Life Insurance [WU]	SP	\$500,001 - \$1,000,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
John G. Rocovich Jr & John T Parker Trust UA 11/01/1989 ⇒ Davenport & Company LLC - Brokerage Account ⇒ Davenport Equity Opportunities (DEOPX) [MF]	SP	\$15,001 - \$50,000	None		
John G. Rocovich Jr & John T Parker Trust UA 11/01/1989 ⇒ Davenport & Company LLC - Brokerage Account ⇒ Prime Cash Obligations [GS]	SP	\$15,001 - \$50,000	None		
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ AB Large Cap Growth Fund Class A (APGAX) [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	None	\$15,001 - \$50,000
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ AB Municipal Income II Virginia A (AVAAX) [MF]	SP	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ American Funds American High-Inc A (AHITX) [MF]	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ American Funds EuroPacific Growth Fund Class A (AEPGX) [MF]	SP	Spouse/DC Over \$1,000,000	Capital Gains, Dividends	None	\$50,001 - \$100,000
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ American Funds New World Fund Class A (NEWFX) [MF]	SP	\$500,001 - \$1,000,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ American Funds SMALLCAP World Fund Class A (SMCWX) [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	None	\$15,001 - \$50,000
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ American Funds The New Economy Fund Class A (ANEFX) [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	None	\$15,001 - \$50,000
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ American Funds Washington Mutual Investors Fund Class A (AWSHX) [MF]	SP	\$500,001 - \$1,000,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$15,001 - \$50,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	\$250,001 - \$500,000	None		
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ Capital World Growth (CWGIX) [MF]	SP	\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	\$15,001 - \$50,000
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ Hartford MidCap A (HFMCX) [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	None	\$15,001 - \$50,000
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ Invesco International Growth (AIIEX) [MF]	SP	\$100,001 - \$250,000	None		
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ Invesco International Growth C (AIECX) [MF]	SP	None	Capital Gains, Dividends	None	\$15,001 - \$50,000
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ Invesco Small Cap Growth A (GTSAX) [MF]	SP	\$250,001 - \$500,000	Capital Gains, Dividends	None	\$15,001 - \$50,000
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ iShares Russell 2000 Index ETF (IWM) [EF]	SP	\$500,001 - \$1,000,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ SPDR Dow Jones Industrial Average ETF (DIA) [EF]	SP	\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ SPDR Euro Stoxx 50 ETF (FEZ) [EF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ SPDR S&P 500 ETF (SPY) [EF]	SP	Spouse/DC Over \$1,000,000	Dividends	\$5,001 - \$15,000	\$15,001 - \$50,000
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ US Treasury Obligations [GS]	SP	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	\$2,501 - \$5,000
Laura T McCreedy Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒	SP	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Mid-Cap Value ETF (VOE) [EF]					
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ Vanguard Small Cap Growth ETF (VBK) [EF]	SP	\$250,001 - \$500,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ Vanguard Small Cap Value ETF (VBR) [EF]	SP	\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ Vanguard Small-Cap ETF (VB) [EF]	SP	\$500,001 - \$1,000,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage ⇒ Vanguard Total Bond Market (VBTLX) [MF]	SP	Spouse/DC Over \$1,000,000	Dividends	\$15,001 - \$50,000	\$50,001 - \$100,000
McKinsey & Company ⇒ Special Situations [HE]		\$50,001 - \$100,000	Tax-Deferred		
Nationwide Income Promise Select Annuity [FN]	SP	\$250,001 - \$500,000	Annuity Payments	None	\$50,001 - \$100,000
NC Solar Fund II, LP [OL] LOCATION: Charlotte, NC, US DESCRIPTION: Solar investment management company		None	Partnership Income	None	\$201 - \$1,000
NC Solar Fund V, LP [OL] LOCATION: Charlotte, NC, US DESCRIPTION: Solar investment management company		\$1,001 - \$15,000	None		
NC Solar Fund VI, LP [OL] LOCATION: Charlotte, NC, US DESCRIPTION: Solar investment management company		\$1,001 - \$15,000	None		
NC Solar Fund VII, LP [OL] LOCATION: Charlotte, NC, US DESCRIPTION: Solar investment management company		\$1,001 - \$15,000	None		
NC Solar Fund VIII, LP [OL] LOCATION: Charlotte, NC, US DESCRIPTION: Solar investment management company		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Pacific Life Variable Universal Life Insurance [WU]	SP	\$250,001 - \$500,000	None		
TD Ameritrade - Insured Deposit Account (IDA) [BA]		\$1,001 - \$15,000	None		
This Land Ventures, LLC ⇒ "This Land" - related trademarks and website domains [IP]		\$1,001 - \$15,000	None		
This Land Ventures, LLC ⇒ Bank of America - Checking [BA]		\$1,001 - \$15,000	None		
This Land Ventures, LLC ⇒ CarDash, Inc. f/k/a Beep Technologies, Inc. [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Convertible Equity. Online platform for booking online auto servicing, care, and maintenance services.					
This Land Ventures, LLC ⇒ WasteZero Working Capital Fund, LLC [OT]		\$100,001 - \$250,000	Interest	None	\$5,001 - \$15,000
DESCRIPTION: Notes & warrants for a sustainable waste company					
TrueBridge Direct Fund (Side), LLC ⇒ TrueBridge Direct Fund I [OL]		\$100,001 - \$250,000	Partnership Income	None	\$15,001 - \$50,000
LOCATION: Chapel Hill, NC, US					
DESCRIPTION: Venture Capital investment fund for technology startups. Fund manager letter on file with the Committee on Ethics.					
USAA Brokerage ⇒ iShares Russell 2000 ETF (IWM) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
USAA Brokerage ⇒ US Treasury Money Market [BA]	JT	\$1 - \$1,000	Interest	None	\$1,001 - \$2,500
USAA Brokerage ⇒ Vanguard 500 Index FD Investor SHS (VFINX) [MF]	JT	None	Capital Gains, Dividends	None	\$50,001 - \$100,000
USAA Brokerage ⇒ Vanguard Life Strat Moderate Growth Inv (VSMGX) [MF]	JT	\$1,000,001 - \$5,000,000	Capital Gains, Dividends	None	\$50,001 - \$100,000
USAA Brokerage ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]	JT	\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
USAA Brokerage ⇒ Vanguard Small-Cap ETF (VB) [EF]	JT	None	Capital Gains, Dividends	None	\$15,001 - \$50,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
USAA Brokerage ⇒ Vanguard Small-Cap Growth ETF (VBK) [EF]	JT	None	Capital Gains, Dividends	None	\$15,001 - \$50,000
USAA Federal Savings Bank [BA]	JT	\$250,001 - \$500,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
DESCRIPTION: Checking & Savings accounts					
USAA Roth IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Roth IRA ⇒ Vanguard Intl Equity Index Fund Inc. FTSE (VWO) [EF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Traditional IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Traditional IRA ⇒ iShares MSCI Chile Capped ETF (ECH) [EF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Traditional IRA ⇒ Vanguard 500 Index Fund Investor Class (VFINX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

* 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
Double Time Capital Management, LP	Guaranteed Payment	N/A	\$250,000.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Managing Partner & Member	Double Time Capital, LLC
Director	North Carolina Sustainable Energy Association

Position	Name of Organization
Board Member	Mecklenburg County Council, Boy Scouts of America
Proprietor	This Land Anthology, LLC
Member	DL Land Ventures LLC
Manager	This Land Ventures, LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2012	Filer and McKinsey & Company	Continuing participation in a defined benefit retirement plan managed by former employer. Employer no longer contributes to the plan.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- o College Foundation of North Carolina # 1 (Owner: DC)
LOCATION: NC
- o College Foundation of North Carolina # 2 (Owner: DC)
LOCATION: NC
- o College Foundation of North Carolina # 3 (Owner: DC)
LOCATION: NC
- o College Foundation of North Carolina # 4 (Owner: DC)
LOCATION: NC
- o Davenport & Company LLC - Child # 1 (Owner: DC)
LOCATION: US
- o Davenport & Company LLC - Child # 2 (Owner: DC)
LOCATION: US
- o Davenport & Company LLC - Child # 3 (Owner: DC)
LOCATION: US
- o Davenport & Company LLC - Child # 4 (Owner: DC)
LOCATION: US
- o DL Land Ventures, LLC (Owner: JT)
LOCATION: US
- o John G. Rocovich Jr & John T Parker Trust UA 11/01/1989 (33% Interest) (Owner: SP)
- o John G. Rocovich Jr & John T Parker Trust UA 11/01/1989 ⇒ Davenport & Company LLC - Brokerage Account (Owner: SP)
LOCATION: US
- o Laura T McCready Revocable Trust - DTD 08/13/12 (Owner: SP)
- o Laura T McCready Revocable Trust - DTD 08/13/12 ⇒ Davenport & Company LLC - Brokerage (Owner: SP)
LOCATION: US

- McKinsey & Company
- This Land Ventures, LLC
LOCATION: Charlotte, NC, US
- TrueBridge Direct Fund (Side), LLC
- USAA Brokerage (Owner: JT)
LOCATION: US
- USAA Roth IRA
- USAA Traditional IRA

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

COMMENTS

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: Daniel McCreedy , 04/14/2019