



Filing ID #10029805

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Osvaldo Vazquez
Status: Congressional Candidate
State/District: FL18

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2019
Filing Date: 11/1/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Capital One 360 Savings Account [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Comm of Mass. Optional Retirement Program ⇒ CREF Inf-Linked Bond R3 [MF]	SP	\$1,001 - \$15,000	None		
Comm of Mass. Optional Retirement Program ⇒ CREF Social Choice R3 [MF]	SP	\$1,001 - \$15,000	None		
Comm of Mass. Optional Retirement Program ⇒ TIAA Real Estate Fund [MF]	SP	\$1,001 - \$15,000	None		
Comm of Mass. Optional Retirement Program ⇒ TIAA Traditional Fund [MF]	SP	\$1,001 - \$15,000	None		
Florida Retirement System ⇒ FRS Retirement Date Fund (2045) [MF]		\$1,001 - \$15,000	None		
Florida Retirement System ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
FRS U.S. Stock Market Index Fund [MF]					
Florida University System ORP [MF]	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Spouse's retirement account from Florida University System. Aggregate value exceeds reporting threshold but no individual holding within account exceeds threshold.					
Rental Property, Fairfax County, VA [RP]	JT	\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	None
LOCATION: Falls Church, VA, US					
Step toe & Johnson 401(k) Profit Sharing Plan ⇒ 401(k) Participant Loan [DO]		\$1,001 - \$15,000	None		
DESCRIPTION: Participant loan (owed by me to my retirement account) held within 401(k) account.					
Step toe & Johnson 401(k) Profit Sharing Plan ⇒ Vanguard Institutional Target Retirement 2040 Fund [MF]		\$50,001 - \$100,000	None		
TD Ameritrade Brokerage Account (Joint) ⇒ Aberdeen Asia-Pacific Income Fund Inc. Common Stock [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TD Ameritrade Brokerage Account (Joint) ⇒ Brookfield Real Assets Income Fund Inc. [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
TD Ameritrade Brokerage Account (Joint) ⇒ SPDR MidCap Trust Series I [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TD Ameritrade Brokerage Account (Joint) ⇒ TD Ameritrade Cash Account [BA]	JT	\$1,001 - \$15,000	None		
TD Ameritrade Brokerage Account (Joint) ⇒ Vanguard 500 Index Fund Admiral Shares [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TD Ameritrade Brokerage Account (Joint) ⇒ Vanguard Intermediate-Term Bond ETF [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TD Ameritrade Brokerage Account (Joint) ⇒ Vanguard Lifestrategy Fund Conservative Growth Fund [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
TD Ameritrade Brokerage Account (Joint) ⇒ Vanguard S&P 500 ETF [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
TD Ameritrade Brokerage Account (Joint) ⇒	JT	\$1,001 - \$15,000	Capital Gains,	None	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Target Retirement 2040 Fund [MF]			Dividends		\$1,000
TD Ameritrade Brokerage Account (Joint) ⇒ Vanguard Total Stock Market ETF [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
TD Ameritrade IRA (Amber Cobb Vazquez) ⇒ Vanguard FTSE Developed Markets ETF [EF]	SP	\$1,001 - \$15,000	None		
TD Ameritrade IRA (Osvaldo Vazquez) ⇒ Cash Account - TD Ameritrade IRA [IH]		\$1,001 - \$15,000	None		
TD Ameritrade IRA (Osvaldo Vazquez) ⇒ Vanguard FTSE All World Ex US ETF [EF]		\$1,001 - \$15,000	None		
TD Ameritrade IRA (Osvaldo Vazquez) ⇒ Vanguard S&P 500 ETF [EF]		\$15,001 - \$50,000	None		
TD Ameritrade IRA (Osvaldo Vazquez) ⇒ Vanguard S&P Mid-Cap 400 Growth ETF [EF]		\$1,001 - \$15,000	None		
TD Ameritrade IRA (Osvaldo Vazquez) ⇒ Vanguard Total Bond Market ETF [EF]		\$1,001 - \$15,000	None		
TD Ameritrade IRA (Osvaldo Vazquez) ⇒ Vanguard Total Stock Market ETF [EF]		\$1,001 - \$15,000	None		
TD Bank Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Undeveloped Lot, Indian River Estates, Saint Lucie County [RP] LOCATION: Indian River Estates, FL, US DESCRIPTION: Undeveloped property inherited from estate of my mother and sold during reporting period.		\$1,001 - \$15,000	Capital Gains	None	\$5,001 - \$15,000
Undeveloped Lot, West Newbury Street [RP] LOCATION: Citrus Springs, FL, US		\$1,001 - \$15,000	None		
Undeveloped Lot, West Newbury Street [RP] LOCATION: Citrus Springs, FL, US		\$1,001 - \$15,000	None		
Undeveloped Lot, West Newbury Street [RP] LOCATION: Citrus Springs, FL, US		\$1,001 - \$15,000	None		
Undeveloped Lot, West Newbury Street [RP]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Citrus Springs, FL, US					

* 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
AARP Foundation	Salary	\$22,505.00	N/A
Step toe & Johnson LLP	Salary	\$73,704.00	\$320,720.00
Tutoring Club of McLean, Inc.	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo Mortgage	May 2017	Mortgage on rental property.	\$500,001 - \$1,000,000
	Osvaldo Vazquez Retirement Account, Step toe & Johnson Profit Sharing 401(k)	May 2017	Participant loan from Step toe & Johnson Profit Sharing 401(k)	\$10,000 - \$15,000
	Navient Student Loans	April 2004	Student Loans for Osvaldo Vazquez	\$15,001 - \$50,000
	Discover Student Loans	December 2005	Student Loans for Osvaldo Vazquez	\$10,000 - \$15,000
SP	Department of Education (Stafford Loans)	August 2008	Student Loans for Amber Cobb Vazquez	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Associate Attorney (former)	Step toe & Johnson LLP
Impact Litigation Attorney (former)	AARP Foundation
Member, Federal Court Practice Committee	Florida Bar

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
May 2019	AARP Employees' Welfare Plan, Candidate, and Beneficiaries	Continuing participation in former employer's healthcare plan, through COBRA after separation.
May 2019	AARP Employees 401(K) Plan and Candidate	Continuing participation in former employer's retirement plan.
November 2013	Florida Retirement System and Candidate	Continuing participation in former employer's retirement plan.
January 2016	Steptoe & Johnson Profit Sharing 401(k)	Continuing participation in former employer's retirement plan.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Comm of Mass. Optional Retirement Program (Owner: SP)
- Florida Retirement System
DESCRIPTION: Osvaldo Vazquez Florida Retirement System account
- Steptoe & Johnson 401(k) Profit Sharing Plan
- TD Ameritrade Brokerage Account (Joint) (Owner: JT)
LOCATION: US
- TD Ameritrade IRA (Amber Cobb Vazquez) (Owner: SP)
- TD Ameritrade IRA (Osvaldo Vazquez)

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: Osvaldo Vazquez , 11/1/2019