



Filing ID #10038290

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Yukong Zhao
Status: Congressional Candidate
State/District: FL07

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2019
Filing Date: 08/12/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America [BA] DESCRIPTION: Family Bank Account Holding	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
Fairwinds Credit Union [BA] DESCRIPTION: Family Joint Bank Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Family Home [RP] LOCATION: Orlando/Orange, FL, US DESCRIPTION: Family Home	JT	\$250,001 - \$500,000	None		
Fidelity- IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	SP	\$15,001 - \$50,000	None		
Fidelity- IRA ⇒ Apple Inc. (AAPL) [ST]	SP	\$1 - \$1,000	None		
Fidelity- IRA ⇒ Collectar Biosciences, Inc. - Series A Warrants (CLRBZ) [ST]	SP	\$1 - \$1,000	None		
Fidelity- IRA ⇒	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Select Med Tech [MF]					
Fidelity- IRA ⇒ Fidelity Select Software & IT [MF]	SP	\$15,001 - \$50,000	None		
Fidelity- IRA ⇒ Fidelity Select Tech [MF]	SP	\$1,001 - \$15,000	None		
Fidelity- IRA ⇒ Johnson & Johnson (JNJ) [ST]	SP	\$1,001 - \$15,000	None		
Fidelity- IRA ⇒ Mastercard Incorporated (MA) [ST]	SP	\$1,001 - \$15,000	None		
Fidelity- IRA ⇒ Netflix, Inc. (NFLX) [ST]	SP	\$1,001 - \$15,000	None		
Fidelity- IRA ⇒ Parnassus Endeavor Fund [MF]	SP	\$1,001 - \$15,000	None		
Fidelity- IRA ⇒ Pfizer, Inc. (PFE) [ST]	SP	\$1,001 - \$15,000	None		
Fidelity- IRA ⇒ Red Oak Tech Select [MF]	SP	\$1,001 - \$15,000	None		
Fidelity- IRA ⇒ Visa Inc. (V) [ST]	SP	\$1,001 - \$15,000	None		
Fidelity- IRA ⇒ Waste Management, Inc. (WM) [ST]	SP	\$1,001 - \$15,000	None		
Golway International, LLC [OL]	JT	\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	\$100,001 - \$1,000,000
LOCATION: Orlando/Orange, FL, US DESCRIPTION: Properties are located in Ocala, FL.					
Industrial and Commercial Bank of China [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Industrial and Commercial Bank of China [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Loan to O&Z Management HLD, LLC [OT]		\$100,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
\$250,000					
DESCRIPTION: Loan borrowed by O&Z Management HLD, LLC.					
Queens Borough Condo [RP]	JT	\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$5,001 - \$15,000
LOCATION: Orlando/Orange, FL, US					
DESCRIPTION: Queens Borough Ave					
Siemens Corporation Deferred Compensation Plan [OT]		\$500,001 - \$1,000,000	Deferred Compensation	\$2,501 - \$5,000	\$15,001 - \$50,000
DESCRIPTION: Deferred compensation paid based on pre-selected schedule.					
Siemens Gamesa Renewable Energy Savings Plan ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	SP	\$15,001 - \$50,000	None		
Siemens Gamesa Renewable Energy Savings Plan ⇒ Apple Inc. (AAPL) [ST]	SP	\$15,001 - \$50,000	None		
Siemens Gamesa Renewable Energy Savings Plan ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	\$15,001 - \$50,000	None		
Siemens Gamesa Renewable Energy Savings Plan ⇒ Bond Index [MF]	SP	\$1,001 - \$15,000	None		
Siemens Gamesa Renewable Energy Savings Plan ⇒ GIC/Stable Value [OT]	SP	\$50,001 - \$100,000	None		
DESCRIPTION: Fixed income funds					
Siemens Gamesa Renewable Energy Savings Plan ⇒ Liquid Availability for Stock Purchase [OT]	SP	\$1 - \$1,000	None		
DESCRIPTION: Cash available for stock purchase					
Siemens Gamesa Renewable Energy Savings Plan ⇒ Netflix, Inc. (NFLX) [ST]	SP	\$15,001 - \$50,000	None		
Siemens Gamesa Renewable Energy Savings Plan ⇒ Non-US Equity [MF]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Siemens Gamesa Renewable Energy Savings Plan ⇒ NVIDIA Corporation (NVDA) [ST]	SP	\$15,001 - \$50,000	None		
Siemens Gamesa Renewable Energy Savings Plan ⇒ S&P 500 Index [MF]	SP	\$15,001 - \$50,000	None		
Siemens Gamesa Renewable Energy Savings Plan ⇒ Small & Mid Cap Equity [MF]	SP	\$15,001 - \$50,000	None		
Siemens Gamesa Renewable Energy Savings Plan ⇒ Target Retirement 2035 [MF]	SP	\$15,001 - \$50,000	None		
Siemens Gamesa Renewable Energy Savings Plan ⇒ Target Retirement 2050 [MF]	SP	\$1,001 - \$15,000	None		
Siemens Gamesa Renewable Energy Savings Plan ⇒ Target Retirement 2060 [MF]	SP	\$1,001 - \$15,000	None		
Siemens Pension [PE] DESCRIPTION: Pension Held		\$100,001 - \$250,000	None		
Siemens Savings Plan 401K ⇒ AbbVie Inc. (ABBV) [ST] DESCRIPTION: Held in 401K		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Siemens Savings Plan 401K ⇒ Alphabet Inc. - Class A (GOOGL) [ST] DESCRIPTION: Held in 401K		\$50,001 - \$100,000	None		
Siemens Savings Plan 401K ⇒ Amazon.com, Inc. (AMZN) [ST] DESCRIPTION: Held in 401K		\$50,001 - \$100,000	None		
Siemens Savings Plan 401K ⇒ Apple Inc. (AAPL) [ST] DESCRIPTION: Held in 401K		\$100,001 - \$250,000	Dividends	None	\$1,001 - \$2,500
Siemens Savings Plan 401K ⇒ Bank of America Corporation (BAC) [ST]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$15,001 - \$50,000	None		
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ Capri Holdings Limited Ordinary Shares (CPRI) [ST]		\$1,001 - \$15,000	None		
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ Cash Portion [BA]		\$100,001 - \$250,000	None		
DESCRIPTION: Liquid portion of 401K - Brokerage available for Stock Purchase					
Siemens Savings Plan 401K ⇒ Core Bond [MF]		\$100,001 - \$250,000	None		
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ High Yield Bond [MF]		\$15,001 - \$50,000	None		
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ International Equity [MF]		\$1 - \$1,000	None		
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ Large Cap US Equity [MF]		\$15,001 - \$50,000	None		
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ Life Cycle 2030 [MF]		\$15,001 - \$50,000	None		
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ Micron Technology, Inc. (MU) [ST]		\$15,001 - \$50,000	None		
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ NVIDIA Corporation (NVDA) [ST]		\$100,001 - \$250,000	Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ Royal Caribbean Cruises Ltd. (RCL) [ST]		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ Small/Mid Cap US Equity [MF]		\$15,001 - \$50,000	None		
DESCRIPTION: Held in 401k					
Siemens Savings Plan 401K ⇒ Stable Value [MF]		\$50,001 - \$100,000	None		
DESCRIPTION: Held in 401K					
Siemens Savings Plan 401K ⇒ Walt Disney Company (DIS) [ST]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
DESCRIPTION: Held in 401K					
Siemens Stock Sale [OT]		\$15,001 - \$50,000	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: Siemens Stock Sale					
Sold Property Commander Dr 1 [RP]	JT	\$100,001 - \$250,000	Capital Gains, Rent	None	\$50,001 - \$100,000
LOCATION: Orlando/Orange, FL, US DESCRIPTION: Sold in 2019					
Sold Property Commander Dr 2 [RP]	JT	\$50,001 - \$100,000	Capital Gains, Rent	None	\$50,001 - \$100,000
LOCATION: Orlando/Orange, FL, US DESCRIPTION: Sold in 2019					
Sold Property Semoran Blvd [RP]	JT	\$100,001 - \$250,000	Capital Gains, Rent	None	\$50,001 - \$100,000
LOCATION: Orlando/Orange, FL, US DESCRIPTION: Sold in 2019					
Stock - Robinhood ⇒ Capri Holdings Limited Ordinary Shares (CPRI) [ST]		\$1,001 - \$15,000	None		
DESCRIPTION: Held in Robin Hood					
Stock - Robinhood ⇒ Micron Technology, Inc. (MU) [ST]		\$15,001 - \$50,000	None		
DESCRIPTION: Held in robinhood					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Stock - Robinhood ⇒ PVH Corp. (PVH) [ST]		\$1,001 - \$15,000	None		
DESCRIPTION: Held in Robinhood					
Stock - Robinhood ⇒ Sold Stock [OT]		\$50,001 - \$100,000	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: Stock Sale Flir Systems, First Trust NYSE, The Estate Lauder Companies, Malibu Boats, Netflix, Royal Caribbean Cruises					

* 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
Siemens Gamesa Renewable Energy	Spouses Income	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Arbor Multifamily Lending, LLC	June 2019	Mortgage borrowed by Golfway International LLC	\$1,000,001 - \$5,000,000
SP	Siemens Gamesa Renewable Energy Saving Plan	June 2019	Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
President	Golfway International, LLC
President	Asian American Coalition for Education

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

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- Fidelity- IRA (Owner: SP)
DESCRIPTION: Spouse Retirement Account
- Siemens Gamesa Renewable Energy Savings Plan (Owner: SP)
DESCRIPTION: Spouse 401K
- Siemens Savings Plan 401K
DESCRIPTION: Siemens 401K Overview
- Stock - Robinhood
LOCATION: US

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: Yukong Zhao , 08/12/2020