



Filing ID #10035361

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Stephen Kuzmich
Status: Congressional Candidate
State/District: TX24

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 05/2/2020
Period Covered: 01/01/2019– 04/6/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AIG Annuity [FN]		\$15,001 - \$50,000	None		
Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]		None	Capital Gains	None	\$2,501 - \$5,000
Amarin Corporation plc - American Depositary Shares, each representing one Ordinary Share (AMRN) [OP] DESCRIPTION: 11-15-19, \$23 Call, non-comp or ESOP		None	Capital Gains	None	\$5,001 - \$15,000
Amarin Corporation plc - American Depositary Shares, each representing one Ordinary Share (AMRN) [OP] DESCRIPTION: 11-15-19, \$24 Call, non-comp or ESOP		None	Capital Gains	None	\$1,001 - \$2,500
American Water Works Company, Inc. (AWK) [ST]		None	Capital Gains, Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
Apple Inc. (AAPL) [ST]		None	Capital Gains, Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of the West [BA]		None	Interest	None	\$1 - \$200
Charles Schwab [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Chase [BA]		None	Interest	None	\$1 - \$200
Coeur Mining, Inc. (CDE) [ST]		None	Capital Gains	None	\$5,001 - \$15,000
Colgate-Palmolive Company (CL) [ST]		None	Capital Gains, Dividends	None	\$5,001 - \$15,000
DHT Holdings, Inc. (DHT) [ST]		None	Dividends	\$201 - \$1,000	None
Ennis, Inc. (EBF) [ST]		None	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Enphase Energy, Inc. (ENPH) [ST]		None	Capital Gains	\$15,001 - \$50,000	None
Enphase Energy, Inc. (ENPH) [OP]		None	Capital Gains	\$15,001 - \$50,000	None
DESCRIPTION: 2-21-20, \$50 Call, non-comp or ESOP					
Fidelity Gov. Money Market [BA]		\$500,001 - \$1,000,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Fidelity MA [5P]		\$1,001 - \$15,000	Tax-Deferred		
LOCATION: MA					
Fidelity NH [5P]		\$1,001 - \$15,000	Tax-Deferred		
LOCATION: NH					
Fidelity NH Second account [5P]		\$1,001 - \$15,000	Tax-Deferred		
LOCATION: NH					
First Data Corporation Class A (FDC) [ST]		None	Capital Gains	None	\$5,001 - \$15,000
First Data Corporation Class A (FDC) [OP]		None	Capital Gains	None	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: 1-15-21, \$18 Call, non-comp or ESOP					
Fiserv, Inc. (FISV) [ST]		None	Capital Gains	None	\$15,001 - \$50,000
DESCRIPTION: 6-21-19, \$90 Call, non-comp or ESOP					
Fiserv, Inc. (FISV) [OP]		None	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: 3-15-19, \$80 Call, non-comp or ESOP					
Fiserv, Inc. (FISV) [OP]		None	Capital Gains	None	\$15,001 - \$50,000
DESCRIPTION: 8-16-19, \$105 Call, non-comp or ESOP					
Fiserv, Inc. (FISV) [OP]		None	Capital Gains	None	\$1 - \$200
DESCRIPTION: 1-17-20, \$190 Call, non-comp or ESOP					
Freeport-McMoRan, Inc. (FCX) [ST]		None	Capital Gains, Dividends	None	\$2,501 - \$5,000
DESCRIPTION: 11-22-19, \$136 Call, non-comp or ESOP					
Hawkins, Inc. (HWKN) [ST]		None	Capital Gains	None	\$201 - \$1,000
DESCRIPTION: 11-8-19, \$131 Call, non-comp or ESOP					
Invesco QQQ Trust, Series 1 (QQQ) [OP]		None	Capital Gains	None	\$15,001 - \$50,000
DESCRIPTION: 11-22-19, \$135 Call, non-comp or ESOP					
Johnson & Johnson (JNJ) [OP]		None	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: 11-22-19, \$135 Call, non-comp or ESOP					
Johnson & Johnson (JNJ) [OP]		None	Capital Gains	None	\$1 - \$200
DESCRIPTION: 11-22-19, \$135 Call, non-comp or ESOP					
Johnson & Johnson (JNJ) [OP]		None	Capital Gains	None	\$1,001 - \$2,500
DESCRIPTION: 11-22-19, \$135 Call, non-comp or ESOP					
Law Office of Nicole Gordillo PLLC [OL]		None	None		
LOCATION: Lewisville/Denton, TX, US DESCRIPTION: Legal Services					
Law Office of Steve Kuzmich P.C. [OL]		\$250,001 - \$500,000	Capital Gains, salary	Not Applicable	Not Applicable

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Lewisville/Denton, TX, US DESCRIPTION: All income reported on schedule C, provides legal services, S-corp					
Microsoft Corporation (MSFT) [ST]		None	Capital Gains, Dividends	None	\$5,001 - \$15,000
New York Mortgage Trust, Inc. (NYMT) [ST]		None	Capital Gains, Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Nintendo Co Ltd ADR (NTDOY) [ST]		None	Capital Gains	None	\$201 - \$1,000
Pan American Silver Corp. (PAAS) [ST]		None	Capital Gains	\$15,001 - \$50,000	None
Pfizer, Inc. (PFE) [ST]		None	Dividends	\$201 - \$1,000	None
Point Bank [BA]		\$1,001 - \$15,000	None		
ProShares Short Dow30 (DOG) [ST]		None	Capital Gains	\$15,001 - \$50,000	None
ProShares UltraShort Bloomberg Crude Oil (SCO) [ST]		None	Capital Gains	\$5,001 - \$15,000	\$5,001 - \$15,000
Purple Innovation, Inc. (PRPL) [ST]		None	Capital Gains	\$2,501 - \$5,000	None
Putnam Growth Opportunities Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		
Sentry Annuity [FN]		\$100,001 - \$250,000	None		
Snap Inc. Class A (SNAP) [ST]		\$15,001 - \$50,000	Capital Gains	\$5,001 - \$15,000	None
SPDR Dow Jones Industrial Average ETF (DIA) [ST]		None	Capital Gains	None	\$15,001 - \$50,000
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	None	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: 1-25-19, \$232.5 Call, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	\$2,501 - \$5,000	None
DESCRIPTION: 2-28-20, \$290 Put, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	None	\$2,501 - \$5,000
DESCRIPTION: 12-20-19, \$280 Call, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	None	\$1,001 - \$2,500
DESCRIPTION: 6-7-19, \$255 Put, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: 9-30-19, \$273 Call, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: 9-30-19, \$280 Call, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: 12-6-19, \$278 Put, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	None	\$2,501 - \$5,000
DESCRIPTION: 9-6-19, \$257 Put, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	\$201 - \$1,000	None
DESCRIPTION: 2-7-20, \$291 Put, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	None	\$1,001 - \$2,500
DESCRIPTION: 9-6-19, \$266 Call, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	None	\$1,001 - \$2,500
DESCRIPTION: 4-26-19, \$266 Put, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	None	\$1 - \$200
DESCRIPTION: 9-27-19, \$266 Put, non-comp or ESOP					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SPDR Dow Jones Industrial Average ETF (DIA) [OP] DESCRIPTION: 2-7-20, \$290 Put, non-comp or ESOP		None	Capital Gains	\$1 - \$200	None
SPDR Dow Jones Industrial Average ETF (DIA) [OP] DESCRIPTION: 3-20-20, \$200 Put, non-comp or ESOP		None	Capital Gains	\$15,001 - \$50,000	None
SPDR Dow Jones Industrial Average ETF (DIA) [OP] DESCRIPTION: 3-6-20 \$265 Put, non-comp or ESOP		None	Capital Gains	\$100,001 - \$1,000,000	None
SPDR Dow Jones Industrial Average ETF (DIA) [OP] DESCRIPTION: 1-18-19 \$255 Put, non-comp or ESOP		None	Capital Gains	None	\$50,001 - \$100,000
SPDR Dow Jones Industrial Average ETF (DIA) [OP] DESCRIPTION: 3-13-20, \$235 Put, non-comp or ESOP		None	Capital Gains	\$15,001 - \$50,000	None
SPDR Dow Jones Industrial Average ETF (DIA) [OP] DESCRIPTION: 2-18-20, \$280 Put, non-comp or ESOP		None	Capital Gains	\$15,001 - \$50,000	None
SPDR Dow Jones Industrial Average ETF (DIA) [OP] DESCRIPTION: 2-28-20, \$265 Put, non-comp or ESOP		None	Capital Gains	\$15,001 - \$50,000	None
SPDR Dow Jones Industrial Average ETF (DIA) [OP] DESCRIPTION: 8-16-19, \$264 Put, non-comp or ESOP		None	Capital Gains	None	\$15,001 - \$50,000
SPDR Dow Jones Industrial Average ETF (DIA) [OP] DESCRIPTION: 5-31-19, \$265 put, non-comp or ESOP		None	Capital Gains	None	\$5,001 - \$15,000
SPDR Dow Jones Industrial Average ETF (DIA) [OP] DESCRIPTION: 9-6-19, \$267 Call, non-comp or ESOP		None	Capital Gains	None	\$15,001 - \$50,000
SPDR Dow Jones Industrial Average ETF (DIA) [OP] DESCRIPTION: 1-21-22, \$240 Call, non-comp or ESOP		None	Capital Gains	\$5,001 - \$15,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: 9-13-19, \$272 Call, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	\$5,001 - \$15,000	None
DESCRIPTION: 2-8-19, \$240 Call, non-comp or ESOP					
SPDR Dow Jones Industrial Average ETF (DIA) [OP]		None	Capital Gains	\$5,001 - \$15,000	None
DESCRIPTION: 1-31-20, \$290 Call, non-comp or ESOP					
SPDR Gold Trust (GLD) [ST]		\$50,001 - \$100,000	Capital Gains	\$2,501 - \$5,000	None
Splunk Inc. (SPLK) [ST]		None	Capital Gains	\$15,001 - \$50,000	None
Square, Inc. Class A (SQ) [ST]		None	Capital Gains	\$5,001 - \$15,000	None
Square, Inc. Class A (SQ) [OP]		None	Capital Gains	None	\$2,501 - \$5,000
DESCRIPTION: 3-15-19, \$60 Call, non-comp or ESOP					
Square, Inc. Class A (SQ) [OP]		None	Capital Gains	None	\$1,001 - \$2,500
DESCRIPTION: 10-25-19, \$62.50 Call, non-comp or ESOP					
Square, Inc. Class A (SQ) [OP]		None	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: 3-15-19, \$70 Call, non-comp or ESOP					
Square, Inc. Class A (SQ) [OP]		None	Capital Gains	None	\$15,001 - \$50,000
DESCRIPTION: 2-22-19, \$75 Put, non-comp or ESOP					
Tech Data Corporation (TECD) [ST]		None	Capital Gains	None	\$201 - \$1,000
Teladoc Health, Inc. (TDOC) [ST]		None	Capital Gains	\$15,001 - \$50,000	\$201 - \$1,000
Teladoc Health, Inc. (TDOC) [OP]		None	Capital Gains	\$5,001 -	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: 4-17-20, \$120 Call, non-comp or ESOP				\$15,000	
Teladoc Health, Inc. (TDOC) [OP]		None	Capital Gains	\$15,001 - \$50,000	None
DESCRIPTION: 3-20-20, \$135 call, non-comp or ESOP					
Teladoc Health, Inc. (TDOC) [OP]		None	Capital Gains	\$15,001 - \$50,000	None
DESCRIPTION: 2-21-20 \$115 call, non-comp or ESOP					
Tencent Holdings Limited Unsponsored ADR Representing B Shares (TCEHY) [ST]		None	Capital Gains, Dividends	None	\$2,501 - \$5,000
Toll Brothers, Inc. (TOL) [ST]		None	Dividends	\$1 - \$200	\$1 - \$200
Twitter, Inc. (TWTR) [ST]		None	Capital Gains	None	\$2,501 - \$5,000
UltraPro Short Dow30 (SDOW) [ST]		\$100,001 - \$250,000	None		
USAA Annuity [FN]		\$100,001 - \$250,000	None		
Walt Disney Company (DIS) [ST]		None	Capital Gains, Dividends	\$2,501 - \$5,000	None
Waste Management, Inc. (WM) [ST]		None	Capital Gains, Dividends	None	\$2,501 - \$5,000
Wheaton Precious Metals Corp Common Shares (WPM) [ST]		None	Capital Gains, Dividends	None	\$5,001 - \$15,000

* 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
Law Office of Steve Kuzmich P.C.	Salary	\$26,931.86	\$447,857.04
Surgical Associates of the Mid-Cities	Spouse Salary	N/A	N/A

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Texas Health Surgery Center Bedford LLC	Spouse Salary	N/A	N/A
North Texas Specialty Physicians	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Advisory Board Member	CASA of Denton County
Member	M and N Holdings LLC
President/Owner	Law Office of Steve Kuzmich P.C.
Member	Law Office of Nicole Gordillo PLLC
Member	Gameday Calendar LLC/Cork Wine Company
Member	AIM Party Foundation

SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
Certain confidential clients are not reported (N/A, TX, US)	Legal services

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: Stephen Kuzmich , 05/2/2020