



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Julie Lynn Oliver
Status: Congressional Candidate
State/District: TX25

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 05/15/2020
Period Covered: 01/01/2019– 04/16/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alphabet Inc. - Class A (GOOGL) [ST]	DC	\$1,001 - \$15,000	None		
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	DC	\$1,001 - \$15,000	None		
American Tower Corporation (AMT) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1 - \$200
Apple Inc. (AAPL) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Ernst & Young 401(k) ⇒ AF EUROPAC GROWTH R6 (RERGX) [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ AF NEW PERSPECT R6 (RNPGX) [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ FID 500 INDEX (FXAIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ FID BLUE CHIP GR K (FBGKX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ernst & Young 401(k) ⇒ FID DIV INTL PL CL 2 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ FID LPS POOL CLASS 2 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ FID REAL ESTATE IDX (FSRNX) [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ TRP NEW HORIZONS I (PRJIX) [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ VANG CAP OPPTS ADM (VHCAX) [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ VANG PRIMECAP CORE (VPCCX) [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ VANG SM VAL IDX INST (VSIIX) [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ VANGUARD TARGET 2035 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ VANGUARD TARGET 2050 [MF]		\$1 - \$1,000	Tax-Deferred		
Ernst & Young 401(k) ⇒ VANGUARD TARGET 2060 [MF]		\$1 - \$1,000	Tax-Deferred		
Exelixis, Inc. (EXEL) [ST]	DC	\$1,001 - \$15,000	None		
fcash [MF]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	None
Fidelity Cash [MF]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	None
HCA 401(k) ⇒ 25-to-go Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HCA 401(k) ⇒ 35-to-go fund [MF]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
HCA 401(k) ⇒ Commodities Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
HCA 401(k) ⇒ Emerging Market Stock Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HCA 401(k) ⇒ High Yield Corporate Bond Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
HCA 401(k) ⇒ Large Company Growth Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HCA 401(k) ⇒ Large Company Value Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
HCA 401(k) ⇒ Real Estate Investment Trust Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HCA 401(k) ⇒ Small Company Growth Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
HCA 401(k) ⇒ Small Company Value Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Intuitive Surgical, Inc. (ISRG) [ST]	DC	\$1,001 - \$15,000	None		
Microsoft Corporation (MSFT) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	None
NeoGenomics, Inc. (NEO) [ST]	DC	\$1,001 - \$15,000	None		
NH Portfolio 2027 ⇒ NH Portfolio 2027 [5P]		\$1,001 - \$15,000	Tax-Deferred		
LOCATION: NH					
Novartis AG (NVS) [ST]	DC	\$1,001 - \$15,000	None		
Oak Crest Rental [RP]	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Austin / Travis, TX, US					
Roche Holdings AG Basel American Depository Shares (RHHBY) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rollover IRA ⇒ AB MULTI-MANAGER SELECT 2040 CL A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ AMERICAN 2040 TARGET DATE RETIREMNT F1 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FID INTL SUSTAINBLTY INDEX FUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FID US SUSTAINBLTY INDEX FUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY CAPITAL & INCOME [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY CONTRAFUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY ENVIRONMENT & ALTERNATIVE ENERGY [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY EXPORT & MULTINATIONAL [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY FREEDOM 2040 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY GOVERNMENT CASH RESERVES [MF]		\$1 - \$1,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY LEVERAGED COMPANY STOCK [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ FIDELITY NEW MARKETS INCOME [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ GREEN CENTURY BALANCED [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ INVESCO EXCHNG TRADED FD TR II SOLAR		\$1,001 - \$15,000	Tax-Deferred		

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ETF [MF]					
Rollover IRA ⇒ PAX GLOBAL ENVIRONMENTAL MRKTS [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ SPDR SERIES TRUST SSGA GNDER ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		
Rollover IRA ⇒ T ROWE PRICE RET 2040 FD [MF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Amazon.com, Inc. (AMZN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Apple Inc. (AAPL) [ST]	SP	\$50,001 - \$100,000	Tax-Deferred		
Roth IRA ⇒ AT&T Inc. (T) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Fidelity Capital & Income [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Fidelity Government Cash Reserves [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Fidelity New Markets Income [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Fidelity Select Technology [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Tweedy Brown Global Value Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
SPDR Select Sector Fund - Technology (XLK) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

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* 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
Notley Ventures	Salary	\$50,892.00	\$167,500.00
Civitech	Spouse salary	\$27,624.00	\$69,519.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	BMW Financial Services	May 2018	Auto loan	\$15,001 - \$50,000
JT	PNC Bank	July 2013	Personal mortgage	\$100,001 - \$250,000
JT	PNC Bank	June 2016	Rental mortgage	\$250,001 - \$500,000
	Wells Fargo Dealer Services	Jan 2019	Auto loan for father	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board member	Central Health
COMMENTS: Board member of the Travis County Healthcare District, an appointed (volunteer) role by Austin's City Council	
Board Member	DivInc
COMMENTS: Volunteer Board Member of 501(c)(3)	

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- o Ernst & Young 401(k)
- o HCA 401(k)
- o NH Portfolio 2027
LOCATION: NH
- o Rollover IRA
- o Roth IRA (Owner: SP)

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: Julie Lynn Oliver , 05/15/2020