



Filing ID #10036082

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Tracy Lyn Lovvorn
Status: Congressional Candidate
State/District: MA02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 05/18/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Capital One Joint ⇒ Coca-Cola Bottling Co. Consolidated (COKE) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Capital One Joint ⇒ General Electric Company (GE) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Capital One Joint ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Capital One Joint ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Capital One Joint ⇒ Starbucks Corporation (SBUX) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Capital One Joint ⇒ Walt Disney Company (DIS) [ST]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Personal Business ⇒ Evolution Therapeutics LLC [OL]	JT	\$250,001 - \$500,000	Partnership	\$50,001 - \$100,000	\$50,001 - \$100,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Grafton, MA, US DESCRIPTION: Private Outpatient Physical Therapy Clinic					
Primerica IRA ⇒ Invesco American Franchise Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Primerica IRA ⇒ Invesco Asia Pacific Growth Fund - CI A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Primerica IRA ⇒ Invesco Health Care Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Primerica IRA ⇒ Invesco Mid Cap Growth Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Primerica IRA ⇒ Invesco Small Cap Discovery Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Real Property ⇒ Rental Property [RP]	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Grafton, MA, US					
Spouse Primerica IRA ⇒ Invesco Asia Pacific Growth Fund - CI A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Primerica IRA ⇒ Invesco Diversified Dividend Fund - CI A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Primerica IRA ⇒ Invesco Mid Cap Growth Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Primerica IRA ⇒ Invesco Small Cap Discovery Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Primerica IRA ⇒ Invesco Technology Fund Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Spouse Vanguard Roth IRA ⇒ VTTHX [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
Spouse Wyman Gordon ⇒ VANGUARD TARGET 2035 [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS Joint ⇒ VBIRX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VBTLX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VEMAX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VEXAX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VGELX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VGSLX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VSBSX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Joint ⇒ VTIAx [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
UBS Joint ⇒ VTSAX [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Vanguard IRA ⇒ Vanguard Federal Money Market Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Vanguard Joint Investment ⇒ VEMAX [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	None
Vanguard Joint Investment ⇒ VEXAX [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Joint Investment ⇒ VTIAx [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Joint Investment ⇒ VTSAX [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Roth IRA ⇒		\$1,001 - \$15,000	Capital Gains,	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
VTTHX [MF]			Dividends		

* 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
Evolution Therapeutics LLC	Partnership	\$36,976.00	\$30,579.00
Wyman Gordon	Spouse Salary	N/A	N/A
Evolution Therapeutics LLC	Spouse Partnership Income	\$36,976.00	\$30,579.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	NewRez	Sept 2014	Elliot Trail Rental	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
CEO/Founder	Evolution Therapeutics LLC

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Capital One Joint (Owner: JT) LOCATION: US - Personal Business (Owner: JT) LOCATION: US - Primerica IRA

- Real Property (Owner: JT)
LOCATION: US
- Spouse Primerica IRA (Owner: SP)
- Spouse Vanguard Roth IRA (Owner: SP)
- Spouse Wyman Gordon (Owner: SP)
- UBS Joint (Owner: JT)
LOCATION: US
- Vanguard IRA
- Vanguard Joint Investment (Owner: JT)
LOCATION: US
- Vanguard Roth 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

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: Tracy Lyn Lovvorn , 05/18/2020