



Filing ID #10039706

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Michael C. Egan
Status: Congressional Candidate
State/District: TX06

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 04/2/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401Ks ⇒ Carvana ⇒ Vanguard Target Retirement 2045 Fund Investor Shares [MF]		\$1,001 - \$15,000	None		
401Ks ⇒ Drinker Biddle ⇒ Fidelity Freedom 2045 Fund - Class K [MF]		\$50,001 - \$100,000	None		
401Ks ⇒ JPMC ⇒ JP Morgan Chase Bank Target Date 2045 Fund [MF]		\$15,001 - \$50,000	None		
401Ks ⇒ Tenet ⇒ American Beacon Small Cap Value Fund Class R5 [MF]		\$1,001 - \$15,000	None		
401Ks ⇒ Tenet ⇒ DFA Emerging Markets Portfolio Institutional Class [MF]		\$1,001 - \$15,000	None		
401Ks ⇒ Tenet ⇒ DFA U.S. Large Cap Value Portfolio Institutional Class [MF]		\$15,001 - \$50,000	None		
401Ks ⇒ Tenet ⇒		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
FIAM Intermediate Inflation-Protected Bond Index Commingled Pool Class D [MF]					
401Ks ⇒ Tenet ⇒ Fidelity Growth Company Commingled Pool Class 3 [MF]		\$15,001 - \$50,000	None		
401Ks ⇒ Tenet ⇒ Fixed Income Fund [MF]		\$1,001 - \$15,000	None		
401Ks ⇒ Tenet ⇒ Met West Total Return Bond Strategy [MF]		\$15,001 - \$50,000	None		
401Ks ⇒ Tenet ⇒ Ridgeworth Mid Cap VAlue [MF]		\$15,001 - \$50,000	None		
401Ks ⇒ Tenet ⇒ Schroder International Alpha Trust - Class 1 [MF]		\$15,001 - \$50,000	None		
401Ks ⇒ Tenet ⇒ Spartan 500 Index Pool Class E [MF]		\$15,001 - \$50,000	None		
401Ks ⇒ Tenet ⇒ Spartan Developed International Index Pool Class E [MF]		\$1,001 - \$15,000	None		
401Ks ⇒ Tenet ⇒ Spartan Real Estate Index Pool Class E [MF]		\$1,001 - \$15,000	None		
Bank Accounts ⇒ Checking [BA]	JT	\$100,001 - \$250,000	None		
Bank Accounts ⇒ Child #1 Savings Account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Bank Accounts ⇒ Child #2 Savings Account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Bank Accounts ⇒ Child #3 Savings Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Bank Accounts ⇒ Savings [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Investments ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Alphabet Inc. - Class C Capital Stock (GOOG) [ST]					
Investments ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Investments ⇒ USAA Cornerstone Mod Aggressive Fund [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Investments ⇒ Vanguard S&P 500 Index ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

* 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
JP Morgan Chase NA	Salary	\$78,514.76	\$197,811.74
Healthtrust Workforce Solutions	Spouse Salary	\$66,120.00	\$210,555.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Service Finance Company, LLC	September 2019	HVAC Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Vice President	JP Morgan Chase
Director of Customer Care	Carvana 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

- 401Ks
- 401Ks ⇒ Carvana
- 401Ks ⇒ Drinker Biddle
- 401Ks ⇒ JPMC
- 401Ks ⇒ Tenet
- Bank Accounts (Owner: JT)
LOCATION: US
- Investments
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: Michael C. Egan , 04/2/2021