



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Charles M. Gearing  
**Status:** Congressional Candidate  
**State/District:** TX05

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 08/13/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Funds New Perspective Fund Class R-6 [EF]	SP	\$1,001 - \$15,000	None		
ARK Next Generation Internet ETF (ARKW) [ST]		\$1,001 - \$15,000	None		
Bank of America Checking [BA]	SP	\$50,001 - \$100,000	None		
Bank of America Savings [BA]	SP	\$1 - \$1,000	None		
Grayscale Bitcoin TR BTC [EF]		\$1,001 - \$15,000	None		
Grayscale Digital Ord F [EF]		\$1,001 - \$15,000	None		
Joint Schwab Checking Account [BA]	JT	\$15,001 - \$50,000	None		
Peloton Interactive, Inc. (PTON) [ST]	SP	\$1,001 - \$15,000	None		
Schwab Checking Account [BA]		\$1 - \$1,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Schwab Investment Account- cash [IH]		\$1,001 - \$15,000	None		
Schwab Rollover IRA [IH]		\$50,001 - \$100,000	None		
Schwab Rollover IRA [IH]		\$1 - \$1,000	None		
Vanguard FTSE Developed Markets Index Fund ETF Shares [EF]		\$1,001 - \$15,000	None		
Vanguard FTSE Emerging Markets Index Fund ETF Shares [EF]		\$1,001 - \$15,000	None		
Vanguard Mid-Cap Value Index Fund ETF Shares [EF]		\$1,001 - \$15,000	None		
Vanguard PRIMECAP Core Fund Investor Shares [EF]	SP	\$15,001 - \$50,000	None		
Vanguard Real Estate Index Fund ETF Shares [EF]		\$1 - \$1,000	None		
Vanguard Short-Term Inflation-Protected Securities Index Fund ETF Shares [EF]		\$1,001 - \$15,000	None		
Vanguard Small-Cap Value Index Fund ETF Shares [EF]		\$1,001 - \$15,000	None		
Vanguard Target Retirement 2055 Trust II [EF]	SP	\$15,001 - \$50,000	None		
Vanguard Total Bond Market Index Fund ETF Shares [EF]		\$1,001 - \$15,000	None		
Vanguard Total International Bond Index Fund ETF Shares [EF]		\$1,001 - \$15,000	None		
Vanguard Total Stock Market ETF (VTI) [EF]	SP	\$50,001 - \$100,000	None		
Vanguard Total Stock Market Index Fund ETF Shares [EF]		\$1,001 - \$15,000	None		
Vanguard Value Index Fund ETF Shares [EF]		\$1,001 - \$15,000	None		

\* 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
Figari + Davenport, LLP	Employment	\$93,750.00	\$171,435.58
Weaver Johnston & Nelson, PLLC	Employment	N/A	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Great Lakes Educational Loans	May 2013	Student Loans	\$15,001 - \$50,000
SP	Great Lakes Educational Loans	May 2013	Student Loans	\$50,001 - \$100,000
	SoFi	May 2009	Student Loans	\$100,001 - \$250,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
President	Dallas Association of Young Lawyers

### SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

### 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

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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:** Charles M. Gearing , 08/13/2021