



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Al Olszewski  
**Status:** Congressional Candidate  
**State/District:** MToo

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 08/5/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ameren Corporation (AEE) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Ascent Bancorp [PS]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
DESCRIPTION: Shares of stock purchased through a limited private offering in an independent community bank in Helena Montana. Shares purchased in 2016.					
Bear Country Design, LLC [OL]	SP	\$1,001 - \$15,000	None		
LOCATION: Kalispell, MT, US DESCRIPTION: Quilt pattern design and sales entity					
Glacier Bank [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Olszewski, Albert D Managed IRA ⇒ AbbVie Inc. (ABBV) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Amgen Inc. (AMGN) [ST]	JT	\$1,001 - \$15,000	None		

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Olszewski, Albert D Managed IRA ⇒ Apple Inc. (AAPL) [ST]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Blackrock Global Long/Short Credit Fund Class K #1940 [MF]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ BlackRock, Inc. (BLK) [ST]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Boeing Company (BA) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Booking Holdings Inc. (BKNG) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Broadcom Inc. (AVGO) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ cash [MF]	JT	\$1 - \$1,000	None		
Olszewski, Albert D Managed IRA ⇒ Celanese Corporation Celanese Corporation (CE) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Cisco Systems, Inc. (CSCO) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Citigroup, Inc. (C) [ST]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Cognizant Technology Solutions Corporation - Class A (CTSH) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ CVS Health Corporation (CVS) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Diageo plc (DEO) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Eaton Corporation, PLC Ordinary Shares (ETN) [ST]	JT	\$1,001 - \$15,000	None		

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Olszewski, Albert D Managed IRA ⇒ Eaton Vance Global MAcro Absolute Return Advantage Fund [MF]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Electronic Arts Inc. (EA) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Eli Lilly and Company (LLY) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Facebook, Inc. - Class A (FB) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Federated Treas Obl FD 68 [IH]	JT	\$50,001 - \$100,000	None		
Olszewski, Albert D Managed IRA ⇒ Fidelity National Information Services, Inc. (FIS) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Flex Ltd. - Ordinary Shares (FLEX) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Garmin Ltd. (GRMN) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Hasbro, Inc. (HAS) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Interpublic Group of Companies, Inc. (IPG) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Invesco Optimum Yield Diversified Commodity Strategy No K-1 ETF (PDBC) [ST]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ iShares core total us Aggregate Bond ETF [MF]	JT	\$100,001 - \$250,000	None		
Olszewski, Albert D Managed IRA ⇒ iShares Russell 2000 ETF (IWM) [ST]	JT	\$50,001 - \$100,000	None		
Olszewski, Albert D Managed IRA ⇒ iShares S&P Mid-Cap 400 Growth ETF (IJK) [ST]	JT	\$50,001 - \$100,000	None		

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Olszewski, Albert D Managed IRA ⇒ iShares S&P Mid-Cap 400 Value ETF (IJJ) [ST]	JT	\$50,001 - \$100,000	None		
Olszewski, Albert D Managed IRA ⇒ James Alpha Global Real Estate Investments Portfolio Class 1 #123 [MF]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Lam Research Corporation (LRCX) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Las Vegas Sands Corp. (LVS) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Manulife Financial Corporation (MFC) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Mondelez International, Inc. - Class A (MDLZ) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Neuberger Berman Long Short Fund [MF]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Nike, Inc. (NKE) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ PGIM high yield fund class Q #1067 [MF]	JT	\$50,001 - \$100,000	None		
Olszewski, Albert D Managed IRA ⇒ Principle high yield fund class R6 [MF]	JT	\$15,001 - \$50,000	None		

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Olszewski, Albert D Managed IRA ⇒ Raytheon Technologies Corporation (RTX) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Suncor Energy Inc. (SU) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Sysco Corporation (SYY) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Target Corporation (TGT) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ TE Connectivity Ltd. New Switzerland Registered Shares (TEL) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ The Blackstone Group Inc. (BX) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ The Hain Celestial Group, Inc. (HAIN) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ The ishares core total usd Bond market ETF [MF]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Thermo Fisher Scientific Inc (TMO) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Toronto Dominion Bank (TD) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Total SE (TOT) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Unilever PLC (UL) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Union Pacific Corporation (UNP) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ United Parcel Service, Inc. (UPS) [ST]	JT	\$1,001 - \$15,000	None		

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Olszewski, Albert D Managed IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Vanguard intermediate term B [MF]	JT	\$50,001 - \$100,000	None		
Olszewski, Albert D Managed IRA ⇒ Vanguard FTSE Developed Markets ETF (VEA) [ST]	JT	\$50,001 - \$100,000	None		
Olszewski, Albert D Managed IRA ⇒ Vanguard Mid-Cap ETF (VO) [ST]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Vanguard Real Estate ETF (VNQ) [ST]	JT	\$15,001 - \$50,000	None		
Olszewski, Albert D Managed IRA ⇒ Visa Inc. (V) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Walt Disney Company (DIS) [ST]	JT	\$1,001 - \$15,000	None		
Olszewski, Albert D Managed IRA ⇒ Waste Management, Inc. (WM) [ST]	JT	\$1,001 - \$15,000	None		
Optum Financial Savings [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Orthopedic Surgery Center, LLC [OL]		\$250,001 - \$500,000	Capital Gains, Interest	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
LOCATION: Kalispell, MT, US					
DESCRIPTION: Installment payment of sale of business entity					
Rental property [RP]	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	None
LOCATION: Kalispell, MT, US					
Starbucks Corporation (SBUX) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
USAA Aggressive Growth Fund [IH]		\$1,001 - \$15,000	None		
USAA Federal Savings [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
USAA World Growth Fund [IH]	SP	\$1,001 - \$15,000	None		

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Wells Fargo Bank Montana [BA]	JT	\$250,001 - \$500,000	Interest	\$1 - \$200	\$1 - \$200
Whihi, LLP [OL]		\$100,001 - \$250,000	Capital Gains, Interest	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
LOCATION: Kalispell, MT, US DESCRIPTION: Installment sale of business real estate					
Whitefish Credit Union [BA]	JT	\$250,001 - \$500,000	Interest	\$2,501 - \$5,000	\$2,501 - \$5,000

\* 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
State of Montana	State Senator		\$3,925.00
Self Employed	Orthopedic Surgeon Consulting	\$88,000.00	\$86,186.00

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
Chairman	Bridges Community Corp.
Partner	WHIHI
Partner	Orthopedic Surgery Center

### 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
Maximum Medical Improvement (Billings, MT, US)	Orthopedic Consultant

### SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> <li>o Olszewski, Albert D Managed IRA (Owner: JT)</li> </ul>
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### 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:** Al Olszewski , 08/5/2021