



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Daniel Cregg McKaughan
Status: Congressional Candidate
State/District: TX08

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 08/24/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 ⇒ A-529 ⇒ Clgadv 529 Clg Enrollment A [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
529 ⇒ M-529 ⇒ Clgadv 529 Clg Enrollment A [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
acreage [RP]		\$100,001 - \$250,000	None		
LOCATION: Montgomery, TX, US DESCRIPTION: Family acreage co-owned with brother and sister.					
Custodian-Select ⇒ Custodian Account-A ⇒ ABNDX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Custodian-Select ⇒ Custodian Account-A ⇒ AGTHX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Custodian-Select ⇒ Custodian Account-A ⇒ CAIBX [MF]		\$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
Custodian-Select ⇒ Custodian Account-A ⇒ CWGCX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Custodian-Select ⇒ Custodian Account-A ⇒ CWGIX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Custodian-Select ⇒ Custodian Account-M ⇒ ABNDX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Custodian-Select ⇒ Custodian Account-M ⇒ AGTHX [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Custodian-Select ⇒ Custodian Account-M ⇒ CAIBX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Custodian-Select ⇒ Custodian Account-M ⇒ Custodian-Select M (Cash, MM) [BA] COMMENTS: Only \$0.01 of value in the account		None	Dividends	None	None
Custodian-Select ⇒ Custodian Account-M ⇒ CWGCX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Custodian-Select ⇒ Custodian Account-M ⇒ CWGIX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ BBCPX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ BBGLX [MF]		\$15,001 - \$50,000	Dividends	None	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ BBGSX [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ BBIEX [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
IRA ⇒ Dan Roth IRA ⇒		\$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
BBTBX [MF]					
IRA ⇒ Dan Roth IRA ⇒ BBVLX [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ Dan Roth IRA ⇒ BBVSX [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ IGAIX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ MEDHX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ Money Market Account [BA]		\$1 - \$1,000	None		
IRA ⇒ Dan Roth IRA ⇒ ODVIX [MF]		\$1 - \$1,000	Dividends	None	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ OGVXX [MF]		\$1 - \$1,000	Dividends	None	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ PHIYX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ SCHH [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ VB [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ VTV [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Dan Roth IRA ⇒ VWO [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
IRA ⇒ Dan Trad. IRA ⇒ Artisan INTL Value I [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ Bridge Builder INTL Equity [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRA ⇒ Dan Trad. IRA ⇒ Bridge Builder Large Growth [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ Bridge Builder Large Value [MF]		\$15,001 - \$50,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ Bridge Builder Small/Mid Grw [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ Bridge Builder Small/Mid Value [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ Dodge and Cox Stock [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ Dta U.S. Small Cap Value I [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ Invesco INTL Growth R6 [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ JPM U.S. Govt Mny Mkt Capital [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ MFS Value R6 [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ NB Mid Cap Growth I [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ Retirement Money Market [BA]		\$1 - \$1,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ TRP Dividend Growth I [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ TRP International Discovery I [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Dan Trad. IRA ⇒ Vanguard TTSE All-World Ex US [EF]		\$100,001 - \$250,000	Tax-Deferred		
IRA ⇒ Stacie Roth IRA ⇒ BBCPX [MF]		\$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
IRA ⇒ Stacie Roth IRA ⇒ BBGLX [MF]		\$15,001 - \$50,000	Dividends	None	\$1 - \$200
IRA ⇒ Stacie Roth IRA ⇒ BBGSX [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
IRA ⇒ Stacie Roth IRA ⇒ BBIEX [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
IRA ⇒ Stacie Roth IRA ⇒ BBTBX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Stacie Roth IRA ⇒ BBVLX [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
IRA ⇒ Stacie Roth IRA ⇒ BBVSX [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
IRA ⇒ Stacie Roth IRA ⇒ IGAIX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Stacie Roth IRA ⇒ MEDHX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Stacie Roth IRA ⇒ Money Market [BA]		\$1 - \$1,000	None		
IRA ⇒ Stacie Roth IRA ⇒ ODVIX [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
IRA ⇒ Stacie Roth IRA ⇒ OGVXX [MF]		\$1 - \$1,000	Dividends	None	\$1 - \$200
IRA ⇒ Stacie Roth IRA ⇒ PHIYX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Stacie Roth IRA ⇒ SCHH [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Stacie Roth IRA ⇒ VB [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Stacie Roth IRA ⇒ VTV [EF]		\$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
IRA ⇒ Stacie Roth IRA ⇒ VWO [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Joint Tenants with right of survivorship ⇒ AGTHX [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Joint Tenants with right of survivorship ⇒ CAIBX [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Tenants with right of survivorship ⇒ CWGIX [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Tenants with right of survivorship ⇒ FMEXX [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Joint Tenants with right of survivorship ⇒ Joint Account--Money Market funds [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: 4% of total joint account					
Navy Federal Credit Union Checking-D [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: D. McKaughan Checking Account					
Navy Federal Credit Union Checking-S [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: S. McKaughan Checking Account					
Navy Federal Credit Union Savings-D [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: D. McKaughan Savings Account					
Navy Federal Credit Union Savings-S [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: S. McKaughan Savings Account					
USAA Savings Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: USAA Savings Account					
Woodforest Bank Checking Account [BA]		\$1 - \$1,000	None		

* 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
Apcon Services, LLC	Spouse Salary	\$1,395.75	\$1,398.25
Apcon Services, LLC	My salary	\$71,250.00	\$114,000.00
DFAS	Military Retirement	\$26,403.30	\$44,731.61
VACP TREAS	Military disability	\$10,627.12	\$16,253.56

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Rocket Mortgage	June 2021	Home mortgage	\$250,001 - \$500,000
COMMENTS: Home loan refinanced in June 2021. Original loan started in March 2016.				

SCHEDULE E: POSITIONS

None disclosed.

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 529 (Owner: SP)
LOCATION: TX
DESCRIPTION: Children's 529
- o 529 ⇒ A-529 (Owner: SP)
LOCATION: TX
DESCRIPTION: Daughter's 529
- o 529 ⇒ M-529 (Owner: SP)
LOCATION: TX
DESCRIPTION: Son's 529
COMMENTS: Son's 529
- o Custodian-Select
LOCATION: US
DESCRIPTION: custodial accounts for children
- o Custodian-Select ⇒ Custodian Account-A
LOCATION: US

DESCRIPTION: Daughter's Custodian Account

- o Custodian-Select ⇒ Custodian Account-M

LOCATION: US

DESCRIPTION: Son's Custodian Account

- o IRA

DESCRIPTION: Multiple IRAs

- o IRA ⇒ Dan Roth IRA

- o IRA ⇒ Dan Trad. IRA

- o IRA ⇒ Stacie Roth IRA

- o Joint Tenants with right of survivorship (Owner: JT)

LOCATION: Montgomery, TX, US

DESCRIPTION: Joint account with cash, money market, and mutual funds

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: Daniel Cregg McKaughan , 08/24/2021