



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Jason Kyle Holic  
**Status:** Congressional Candidate  
**State/District:** FL10

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2022  
**Filing Date:** 07/5/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ike 529 ⇒ Age-Based [5P] LOCATION: FL		\$1,001 - \$15,000	None		
Ike 529 ⇒ Small/Mid Cap Equity Index Fund [5P] LOCATION: FL		\$1,001 - \$15,000	None		
Ike 529 ⇒ U.S. Broad All Cap Index Fund [5P] LOCATION: FL		\$1 - \$1,000	None		
Investment Account ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	None		
Investment Account ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	None		
Investment Account ⇒ Dominion Energy, Inc. (D) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Investment Account ⇒		\$15,001 - \$50,000	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>
FAGIX [MF]					
Investment Account ⇒ FDEGX [MF]		\$1,001 - \$15,000	None		
Investment Account ⇒ FDVLX [MF]		\$1,001 - \$15,000	None		
Investment Account ⇒ FIDELITY CAPITAL & INCOME [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Investment Account ⇒ FLOWX [MF]		\$1 - \$1,000	None		
Investment Account ⇒ FNBGX [MF]		\$1,001 - \$15,000	None		
Investment Account ⇒ FSKAX [MF]		\$1,001 - \$15,000	None		
Investment Account ⇒ IVW [MF]		\$1,001 - \$15,000	None		
Investment Account ⇒ Lucid Group, Inc. (LCID) [ST]		\$1,001 - \$15,000	None		
Investment Account ⇒ OLGAX [MF]		\$50,001 - \$100,000	None		
Investment Account ⇒ QUALCOMM Incorporated (QCOM) [ST]		\$1,001 - \$15,000	None		
Investment Account ⇒ SMCWX [MF]		\$15,001 - \$50,000	None		
Jude 529 ⇒ Age-Based [5P] LOCATION: FL		\$1,001 - \$15,000	None		
Jude 529 ⇒ Small/Mid Cap Equity Index Fund [5P] LOCATION: FL		\$1,001 - \$15,000	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>
Jude 529 ⇒ U.S. Broad All Cap Index Fund [5P]		\$1,001 - \$15,000	None		
LOCATION: FL					
Roth IRA ⇒ FBGRX [MF]		\$1,001 - \$15,000	None		
Roth IRA ⇒ FCNTX [MF]		\$1,001 - \$15,000	None		
Roth IRA ⇒ FSCSX [MF]		\$1,001 - \$15,000	None		
Roth IRA ⇒ ITHAX [MF]		\$15,001 - \$50,000	None		
Roth IRA ⇒ NYVTX [MF]		\$15,001 - \$50,000	None		
Roth IRA ⇒ SGOVX [MF]		\$15,001 - \$50,000	None		
Roth IRA ⇒ TVAFX [MF]		\$1,001 - \$15,000	None		
Spouse Traditional IRA ⇒ Cash [IH]		\$1,001 - \$15,000	None		
Traditional IRA ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	None		
Traditional IRA ⇒ FBIOX [MF]		\$1,001 - \$15,000	None		
Traditional IRA ⇒ FBSOX [MF]		\$1,001 - \$15,000	None		
Traditional IRA ⇒ FDLSX [MF]		\$1,001 - \$15,000	None		
Traditional IRA ⇒ FSCSX [MF]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Traditional IRA ⇒ FSKAX [MF]		\$1 - \$1,000	None		
Vanguard 401(k) ⇒ American Funds Trgt Date Ret 2050 R6 (50) [MF]		\$50,001 - \$100,000	None		
Vanguard 401(k) ⇒ JPMorgan Equity Income R6 (40) [MF]		\$15,001 - \$50,000	None		
Vanguard 401(k) ⇒ JPMorgan Small Cap Growth R6(10) [MF]		\$1,001 - \$15,000	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
Florida Annual Conference of the Un	Spouse Salary	\$6,389.00	\$13,849.00
Osceola Convention and Visitors Bureau Inc	Salary	\$75,763.67	\$168,709.75

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
VP Business Applications & Insights	Experience Kissimmee
Authorized Member	Mosquito County Beer Company

### SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

### SCHEDULE A ASSET CLASS DETAILS

- Ike 529  
LOCATION: FL
- Investment Account  
LOCATION: US
- Jude 529  
LOCATION: FL
- Roth IRA
- Spouse Traditional IRA
- Traditional IRA
- Vanguard 401(k)

## 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:** Jason Kyle Holic , 07/5/2022