



Filing ID #10072719

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Carlos De La Cruz  
**Status:** Congressional Candidate  
**State/District:** TX35

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 02/04/2026  
**Period Covered:** 01/01/2025– 01/02/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Allianz 222 Fixed Annuity [FN]		\$50,001 - \$100,000	Annuity Payments	\$201 - \$1,000	\$5,001 - \$15,000
Capital One Savings [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
RBFCU [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
ADP_401K (Carlos) ⇒ Fidelity Freedom Index 2045 Fund - Investor Class (FIOFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
ADP_401K (Carlos) ⇒ State Street Equity 500 Index Fund Class K (SSSYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
ADP_401K (Carlos) ⇒ Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
American Funds_ ROTH IRA (Annie) ⇒ The Growth Fund of America Class A Shares (AGTHX)	SP	\$1,001 - \$15,000	Tax-Deferred		

<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>
[MF]					
American Funds Roth IRA (Carlos) ⇒ American Funds Growth Portfolio Class A (GWPAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
American Funds Roth IRA (Carlos) ⇒ American Funds New Economy Fund A (ANEFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
American Funds Roth IRA (Carlos) ⇒ American Funds SMALLCAP World A (SMCWX) [MF]		\$1 - \$1,000	Tax-Deferred		
American Funds Roth IRA (Carlos) ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
CommuniCare 401K (Annie) ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
CommuniCare 401K (Annie) ⇒ Fidelity Small Cap Index Fund (FSSNX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
CommuniCare 401K (Annie) ⇒ T. Rowe Price Blue Chip Growth Fund, Inc. (TRBCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
CommuniCare 401K (Annie) ⇒ Vanguard Developed Markets Index Admiral (VTMGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA (Annie) ⇒ Schwab International Index Fund - Select Shares (SWISX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA (Annie) ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Schwab Roth IRA (Annie) ⇒ Schwab Small-Cap Index Fund-Select Shares (SWSSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab Roth IRA (Annie) ⇒ Schwab U.S. Large-Cap Growth Index Fund (SWLGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

<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_ROTH IRA (Carlos) ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab_ROTH IRA (Carlos) ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Schwab_ROTH IRA (Carlos) ⇒ ARK Innovation ETF (ARKK) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab_ROTH IRA (Carlos) ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab_ROTH IRA (Carlos) ⇒ Rivian Automotive, Inc. - Class A Common Stock (RIVN) [ST]		\$1 - \$1,000	Tax-Deferred		
Schwab_ROTH IRA (Carlos) ⇒ Schwab International Index Fund - Select Shares (SWISX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab_ROTH IRA (Carlos) ⇒ Schwab S&P 500 Index Fund- Select Shares (SWPPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab_ROTH IRA (Carlos) ⇒ Schwab Small-Cap Index Fund-Select Shares (SWSSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab_ROTH IRA (Carlos) ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab_ROTH IRA (Carlos) ⇒ Schwab U.S. Broad Market ETF (SCHB) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Schwab_ROTH IRA (Carlos) ⇒ Visa Inc. (V) [ST]		\$1 - \$1,000	Tax-Deferred		
Valor Healthcare 401k (Annie) ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Valor Healthcare 401k (Annie) ⇒ T. Rowe Price Retirement Blend 2045 Fund (TRBQX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
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\* Investment Vehicle 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
Omni Consulting Solutions LLC	Salary	N/A	\$51,028.00
Communicare	Spouse Salary	N/A	N/A

### SCHEDULE D: LIABILITIES

None disclosed.

### 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 INVESTMENT VEHICLE DETAILS

- o Schwab\_ROTH IRA (Carlos)
- o CommuniCare 401K (Annie) (Owner: SP)
- o ADP\_401K (Carlos)
- o American Funds\_ROTH IRA (Carlos)  
DESCRIPTION: Capital Group
- o Valor Healthcare 401k (Annie) (Owner: SP)
- o American Funds\_ROTH IRA (Annie) (Owner: SP)
- o Schwab\_ROTH IRA (Annie) (Owner: SP)

### 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:** Carlos De La Cruz , 02/04/2026