



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Caitlin McClay Rourk
Status: Congressional Candidate
State/District: TX10

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2026
Filing Date: 05/13/2026
Period Covered: 01/01/2025– 04/15/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AST SpaceMobile, Inc. - Class A Common Stock (ASTS) [ST]	JT	\$1,001 - \$15,000	Capital Gains	None	Not Applicable
Cash [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Dell Technologies Inc. Class C Common Stock (DELL) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
DFA Emerging Markets Portfolio I (DFEMX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DFA U.S. Micro Cap Portfolio (DFSCX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DFA US Large Company Portfolio (DFUSX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		
Dimensional 2045 Target Date Retirement Income Fund Institutional Class (DRIIX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity 500 Index Fund (FXAIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity 500 Index Fund (FXAIX) [MF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Fidelity Freedom Index 2045 Fund - Investor Class (FIOFX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Fidelity Freedom Index 2045 Fund - Investor Class (FIOFX) [MF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Wise Origin Bitcoin Fund (FBTC) [EF]	JT	\$100,001 - \$250,000	Capital Gains	None	None
NH College Port. (Fidelity Index) - NHX000903 [5F] LOCATION: NH	SP	\$15,001 - \$50,000	Tax-Deferred		
NH Fidelity 500 Index - NHFSMKX98 [5F] LOCATION: NH	SP	\$15,001 - \$50,000	Tax-Deferred		
The Kraft Heinz Company - Common Stock (KHC) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Vanguard Index Trust Total Stock Market Index Fund Institutional Share (VITSX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		

* 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
Dimensional Investment, LLC (US)	Salary	\$152,307.00	\$501,726.00
Dell USA LP	Salary	N/A	\$198,965.16

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.

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: Caitlin McClay Rourk , 05/13/2026