



Filing ID #10079855

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Ms. Kimberly Overman
Status: Congressional Candidate
State/District: FL12

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2026
Filing Date: 05/29/2026
Period Covered: 01/01/2025– 05/06/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Irrevocable Testamentary Trust [EQ]		Undetermined	Excepted/Blind Trust	\$120,000.00	\$120,000.00
FRS Investment Plan ⇒ FRS Investment Plan [PE]		\$50,001 - \$100,000	Tax-Deferred		
IRA ⇒ Baird Core Plus Bond Fund Institutional Class (BCOIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Harbor International Fund Insti Cl (HAINX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST] DESCRIPTION: Dividends reinvested		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
IRA ⇒ Sound Shore Fund - Investor Class (SSHFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA ⇒		\$7,188.00	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
WisdomTree U.S. AI Enhanced Value Fund (AIVL) [EF]					
DESCRIPTION: Dividends reinvested					

* 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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America	2025	Credit Card	\$15,001 - \$50,000
	Bank of Tampa	2020	Mortgage on home	\$100,001 - \$250,000
JT	Valon	2019	Mortgage on jointly owned home	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
CEO	The Financial Well, Inc
Managing Partner	The Heights Exchange LLC
Founder/Registrar	Housing Leadership Council of Tampa Bay

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- IRA
DESCRIPTION: Individual IRA Brokerage Account
- FRS Investment Plan
DESCRIPTION: Florida Retirement System Investment Plan

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: Ms. Kimberly Overman , 05/29/2026