



Filing ID #10081401

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Craig M. Swallow
Status: Congressional Candidate
State/District: MA09

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2026
Filing Date: 07/31/2026
Period Covered: 01/01/2025– 07/03/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Michael Dale Toast Restricted Stock Units [RS]	SP	\$15,001 - \$50,000	None		
Craig Swallow 401K ⇒ Fidelity Freedom 2050 Fund (FFHFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ DFA Five-Year Global Fixed Income Portfolio (DFGBX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ DFA Global Core Plus Fixed Income Portfolio (DGCFX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ DFA Investment Grade Portfolio (DFAPX) [MF]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Craig Swallow Rollover IRA(s) ⇒ DFA Real Estate Securities Portfolio (DFREX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ DFA Short-Term Extended Quality Ptf (DFEQX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ DFA U.S. Core Equity 1 Portfolio (DFEOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$1 - \$1,000	None		
Craig Swallow Rollover IRA(s) ⇒ DFA US Large Company Portfolio (DFUSX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ DFA World ex U.S. Government Fixed Income Port Instl (DWFIX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ DFA World ex U.S. Targeted Value Portfolio Instl Class (DWUSX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ Emerging Markets Core Equity 2 Portfolio (DFCEX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ International Core Equity 2 Portfolio (DFIEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Craig Swallow Rollover IRA(s) ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow ROTH IRA ⇒ DFA Five-Year Global Fixed Income Portfolio (DFGBX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ DFA Global Core Plus Fixed Income Portfolio (DGCFX) [MF]		\$1 - \$1,000	None		

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Craig Swallow ROTH IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ DFA Investment Grade Portfolio (DFAPX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ DFA Real Estate Securities Portfolio (DFREX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ DFA Short-Term Extended Quality Ptf (DFEQX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ DFA U.S. Core Equity 1 Portfolio (DFEOX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ DFA US Large Company Portfolio (DFUSX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow ROTH IRA ⇒ DFA World ex U.S. Government Fixed Income Port Instl (DWFIX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ DFA World ex U.S. Targeted Value Portfolio Instl Class (DWUSX) [MF]		\$1 - \$1,000	Tax-Deferred		
Craig Swallow ROTH IRA ⇒ Emerging Markets Core Equity 2 Portfolio (DFCEX) [MF]		\$1 - \$1,000	None		
Craig Swallow ROTH IRA ⇒ International Core Equity 2 Portfolio (DFIEX) [MF]		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Craig Swallow ROTH IRA ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]		\$1 - \$1,000	Tax-Deferred		
Joint Brokerage Account ⇒ Money Market Brokerage [BA]	JT	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$201 - \$1,000
Joint Taxable Investment Account ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]	JT	\$1 - \$1,000	None		
Joint Taxable Investment Account ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]	JT	\$1 - \$1,000	None		
Joint Taxable Investment Account ⇒ DFA Real Estate Securities Portfolio (DFREX) [MF]	JT	\$1 - \$1,000	None		
Joint Taxable Investment Account ⇒ DFA U.S. Core Equity 1 Portfolio (DFEOX) [MF]	JT	\$1,001 - \$15,000	None		
Joint Taxable Investment Account ⇒ DFA U.S. Core Equity 2 Portfolio (DFQTX) [MF]	JT	\$1,001 - \$15,000	None		
Joint Taxable Investment Account ⇒ DFA U.S. Targeted Value Portfolio (DFFVX) [MF]	JT	\$1,001 - \$15,000	None		
Joint Taxable Investment Account ⇒ DFA US Large Company Portfolio (DFUSX) [MF]	JT	\$1,001 - \$15,000	None		
Joint Taxable Investment Account ⇒ DFA World ex U.S. Targeted Value Portfolio Instl Class (DWUSX) [MF]	JT	\$1 - \$1,000	None		
Joint Taxable Investment Account ⇒ Emerging Markets Core Equity 2 Portfolio (DFCEX) [MF]	JT	\$1,001 - \$15,000	None		
Joint Taxable Investment Account ⇒ International Core Equity 2 Portfolio (DFIEX) [MF]	JT	\$1,001 - \$15,000	None		
Joint Taxable Investment Account ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]	JT	\$1,001 - \$15,000	None		
Michael Dale 401K ⇒ Emerging Markets Core Equity 2 Portfolio (DFCEX)	SP	\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[MF]					
Michael Dale 401K ⇒ Fidelity Balanced Private Pool Trust Series F5 U\$ NL (FKLNX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Michael Dale 401K ⇒ Fidelity Freedom Index 2050 Fund - Investor Class (FIPFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Michael Dale 401K ⇒ Toast, Inc. Class A Common Stock (TOST) [ST]	SP	\$15,001 - \$50,000	None		
Michael Dale 401K ⇒ Vanguard Growth Index Fd Admiral Shs (VIGAX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Michael Dale 401K ⇒ Vanguard Mid-Cap Value Index Fd Admiral (VMVAX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Michael Dale 401K ⇒ Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
Michael Dale Robinhood App ⇒ ADT Inc. Common Stock (ADT) [ST]	SP	\$1 - \$1,000	None		
Michael Dale Robinhood App ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$1 - \$1,000	None		
Michael Dale Robinhood App ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]	SP	\$1 - \$1,000	None		
Michael Dale Rollover IRA ⇒ DFA Five-Year Global Fixed Income Portfolio (DFGBX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Michael Dale Rollover IRA ⇒ DFA Global Core Plus Fixed Income Portfolio (DGCFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Michael Dale Rollover IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Michael Dale Rollover IRA ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Michael Dale Rollover IRA ⇒ DFA Investment Grade Portfolio (DFAPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Michael Dale Rollover IRA ⇒ DFA Real Estate Securities Portfolio (DFREX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Michael Dale Rollover IRA ⇒ DFA Short-Term Extended Quality Ptf (DFEQX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Michael Dale Rollover IRA ⇒ DFA U.S. Core Equity 1 Portfolio (DFEOX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
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Michael Dale Rollover IRA ⇒ International Core Equity 2 Portfolio (DFIEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Michael Dale Rollover IRA ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Michael Dale ROTH IRA ⇒ DFA Five-Year Global Fixed Income Portfolio		\$1,001 - \$15,000	Tax-Deferred		

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(DFGBX) [MF]					
Michael Dale ROTH IRA ⇒ DFA Global Core Plus Fixed Income Portfolio (DGCFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Michael Dale ROTH IRA ⇒ DFA Global Real Estate Securities Ptf (DFGEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Michael Dale ROTH IRA ⇒ DFA International Vector Equity Ptf (DFVQX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Michael Dale ROTH IRA ⇒ DFA Investment Grade Portfolio (DFAPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
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Michael Dale ROTH IRA ⇒ U.S. Vector Equity Portfolio (DFVEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		

* 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
Toast, Inc.	Spouse Salary	N/A	N/A
Toast, Inc.	Personal Income	\$23,000.00	\$15,399.00
Profile Rock, Inc.	Personal Income	N/A	\$8,211.00
Little Moss	Personal Income	N/A	\$15,260.00

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

◦ Craig Swallow Rollover IRA(s) ◦ Craig Swallow ROTH IRA ◦ Michael Dale Rollover IRA ◦ Michael Dale ROTH IRA ◦ Joint Taxable Investment Account (100% Interest) (Owner: JT)

LOCATION: US

- Joint Brokerage Account (100% Interest) (Owner: JT)

LOCATION: US

- Craig Swallow 401K
 - Michael Dale 401K (Owner: SP)
 - Michael Dale Robinhood App (Owner: SP)
- LOCATION: US

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: Craig M. Swallow , 07/31/2026