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# Annual Report for Calendar 2024

The Honorable Rafael E Cruz (Cruz, Ted)

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Print Report

The following statements were checked before filing:

- I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.
- I *omitted* assets because they meet the three-part test for exemption.

## Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance? **No**

## Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Spouse	Salary	Goldman Sachs and Co Jersey City, NJ	> \$1,000	n/a

## Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

	Asset	Asset Type	Owner	Value	Income Type	Income
1	<a href="#">GAJPIX</a> - Goldman Sachs Dynamic Municipal Income Fund Class	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Excepted Investment Fund	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
2	<a href="#">VYM</a> - High Dividend Yield Vanguard ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	\$201 - \$1,000
3	<b>XOM-Exxon Mobil Corporation (NYSE)</b>	Corporate Securities Stock	Joint	\$100,001 - \$250,000	Dividends,	\$5,001 - \$15,000
4	<a href="#">VIG</a> - Dividend Appreciation ETF Vanguard	Mutual Funds Exchange Traded Fund/Note	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$1,001 - \$2,500
5	<a href="#">XLE</a> - SPDR Select Sector Fund - Energy Select Sector	Mutual Funds Exchange Traded Fund/Note	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	\$201 - \$1,000
6	<a href="#">SPY</a> - SPDR S&P 500	Mutual Funds Exchange Traded Fund/Note	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
7	<a href="#">GSPPX</a> - Goldman Sachs Strategic Growth Fund Class P	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
8	<a href="#">GMYPX</a> - Goldman Sachs Large Cap Value Fund Class P Share	Mutual Funds Mutual Fund	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
9	<b>EPD-Enterprise Products Partners L.P. (NYSE)</b>	Corporate Securities Stock	Joint	\$100,001 - \$250,000	Dividends,	\$5,001 - \$15,000
10	<a href="#">DRLL</a> - EA Series Trust Strive U.S. Energy ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	\$201 - \$1,000
11	<a href="#">HNDL</a> - Strategy Shares Nasdaq 7HANDL Index ETF	Mutual Funds Exchange Traded Fund/Note	Joint	None (or less than \$1,001)	Excepted Investment Fund,	None (or less than \$201)
12	<b>Goldman Sachs Bank USA</b> (Houston, Texas) <i>Type: Savings,</i>	Bank Deposit	Joint	\$100,001 - \$250,000	Interest,	\$2,501 - \$5,000
13	<b>USAA 529 - Child 2</b> <i>Institution: USAA</i>	Education Savings Plans 529 College Savings Plan	Joint			
13.1	<b>Age-Based Option 14-15: Conservative Portfolio</b>	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
13.2	<b>Plan FBO Aggressive Growth Portfolio</b>	Mutual Funds	Joint	\$50,001 -	Excepted	None (or

Asset	Mutual Fund Asset Type	Owner	\$100,000 Value	Investment Income Type	less than \$201)	
13.3	<b>Plan FBO Moderately Aggressive Portfolio</b>	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
13.4	<b>Plan FBO Moderate Portfolio</b>	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
14	<b>Fidelity 529 - Child 1</b> <i>Institution: Fidelity</i>	Education Savings Plans 529 College Savings Plan	Joint			
14.1	<b>MA Portfolio 2027</b>	Mutual Funds Mutual Fund	Joint	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
15	<b>Traditional IRA</b>	Retirement Plans IRA	Spouse			
15.1	<a href="#">GAFPX</a> - <b>Goldman Sachs Enhanced Dividend Global Equity Port</b>	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	\$1,001 - \$2,500
16	<b>Bank of America</b> (Houston, Texas) <i>Type: Checking,</i>	Bank Deposit	Joint	\$15,001 - \$50,000	Interest,	None (or less than \$201)
17	<b>Bank of America</b> (Houston, Texas) <i>Type: Savings,</i>	Bank Deposit	Joint	\$15,001 - \$50,000	Interest,	None (or less than \$201)
18	<b>American Express</b> (Houston, Texas) <i>Type: Savings,</i>	Bank Deposit	Joint	\$1,001 - \$15,000	Interest,	None (or less than \$201)
19	<b>Chase</b> (Houston, Texas) <i>Type: Checking,</i>	Bank Deposit	Joint	\$1,001 - \$15,000	Interest,	None (or less than \$201)
20	<b>Texas ERS Retirement Account</b>	Retirement Plans Defined Benefit Pension Plan	Self	\$50,001 - \$100,000	None,	None (or less than \$201)
21	<b>Health Equity HSA</b> (Houston, Texas) <i>Type: Savings,</i>	Bank Deposit	Self	\$1,001 - \$15,000	Interest,	None (or less than \$201)
22	<b>Morgan Lewis Bockius LLP Tax-Saver Retirement Plan</b>	Retirement Plans Defined Contribution Pension Plan	Self			

22.1	<b>Vanguard Target Retirement 2040 Tr I</b>	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
22.2	<b><a href="#">VGSNX</a> - Vanguard Real Estate Index Fund Institutional Shar</b>	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Excepted Investment Fund,	\$1,001 - \$2,500
22.3	<b><a href="#">AEPGX</a> - American Funds Europacific Growth A</b>	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
22.4	<b><a href="#">FSSLX</a> - Fidelity Series Small Cap Core Fund</b>	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
23	<b>Morgan Lewis Bockius LLP Defined Contribution Plan</b>	Retirement Plans Defined Contribution Pension Plan	Self			
23.1	<b>Vanguard Target Retirement 2035 Tr I</b>	Mutual Funds Mutual Fund	Self	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
24	<b>Morgan Lewis Cash Balance Retirement Plan</b>	Retirement Plans Defined Benefit Pension Plan	Self	\$500,001 - \$1,000,000	None,	None (or less than \$201)
25	<b>Goldman Sachs</b> (Houston, Texas) <i>Type: Savings,</i>	Bank Deposit	Child	\$1,001 - \$15,000	Interest,	\$201 - \$1,000
26	<b>Goldman Sachs</b> (Houston, Texas) <i>Type: Savings,</i>	Bank Deposit	Child	\$1,001 - \$15,000	Interest,	\$201 - \$1,000
27	<b>Goldman Sachs</b> (Houston, Texas) <i>Type: Checking,</i>	Bank Deposit	Child	\$1,001 - \$15,000	Interest,	None (or less than \$201)
28	<b>GS-The Goldman Sachs Group, Inc.</b>	Corporate Securities Stock	Spouse	\$1,000,001 - \$5,000,000	Dividends, Interest,	\$15,001 - \$50,000
29	<b>Spouse 401K</b>	Retirement Plans Defined Contribution Pension Plan	Spouse			
29.1	<b><a href="#">LIJIX</a> - BlackRock LifePath Index 2035 Fund Institutional S</b>	Mutual Funds Mutual Fund	Spouse	\$1,000,001 - \$5,000,000	Excepted Investment Fund,	None (or less than \$201)
30	<b>Bitcoin</b>	Cryptocurrency	Self	\$100,001 - \$250,000	None,	None (or less than \$201)

	Exchange/Platform: Hiver Financial Inc Asset	Asset Type	Owner	\$250,000 Value	Income Type	less than \$201.00
31	<b>Bitcoin Miners</b> <i>Description: Three Bitcoin Miners (Iraan, Texas)</i>	Other Securities	Self			
31.1	<b>Bitcoin Miners</b> <i>Description: Bitmain S21</i>	Personal Property Other	Self	\$15,001 - \$50,000	Other, (Bitcoin)	Other \$5,001.00
32	<b>Private Equity Co-Investment Partners III LLC</b> <i>Description: Private Equity (New York, NY)</i>	Investment Fund Private Equity Fund	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$201 - \$1,000
33	<b>TPG Tech Adjacencies II Access LLC</b> <i>Description: Private Equity (New York, NY)</i>	Investment Fund Private Equity Fund	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	\$2,501 - \$5,000

### Part 4a. Periodic Transaction Report Summary

In this section, electronically filed periodic transaction report (PTR) transactions are displayed for you.

#	Transaction Date	Owner	Ticker	Asset Name	Type	Amount	Comment
1	04/15/2024	Spouse	GS	Goldman Sachs Group	Sale (Partial)	\$250,001 - \$500,000	--

### Part 4b. Transactions

Did you, your spouse, or dependent child buy, sell, or exchange an asset where the transaction exceeded \$1,000 and was not reported on Part 4a? **Yes**

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
1	Joint	<a href="#">GGRPX</a>	Goldman Sachs Commodity Strategy Fund Class P Sh	Sale (Full)	12/18/2024	\$15,001 - \$50,000	n/a
2	Joint	<a href="#">GGLPX</a>	Goldman Sachs High Yield Municipal Fund Class P	Sale (Full)	12/18/2024	\$1,001 - \$15,000	n/a
3	Joint	<a href="#">BFK</a>	BlackRock Municipal Income Trust	Sale (Full)	12/18/2024	\$250,001 - \$500,000	n/a

#	Counter	ISIN	Security Name	Transaction Type	Transaction Date	Transaction Amount	Comments
		<a href="#">GGMPX</a>	Sachs High Yield Fund Class P Shares	Sale (Full)	12/18/2024	\$1,001 - \$15,000	
5	Joint	--	GMWPX - Goldman Sachs Emerging Markets Credit Fund P	Sale (Full)	12/18/2024	\$1,001 - \$15,000	n/a
6	Joint	<a href="#">GAJPX</a>	Goldman Sachs Dynamic Municipal Income Fund Clas	Sale (Partial)	10/09/2024	\$1,001 - \$15,000	n/a
7	Joint	<a href="#">GGMPX</a>	Goldman Sachs High Yield Fund Class P Shares	Sale (Partial)	10/09/2024	\$1,001 - \$15,000	n/a
8	Joint	<a href="#">HNDL</a>	Strategy Shares Nasdaq 7HANDL Index ETF	Sale (Partial)	10/07/2024	\$1,001 - \$15,000	n/a
9	Joint	<a href="#">GAJPX</a>	Goldman Sachs Dynamic Municipal Income Fund Clas	Sale (Partial)	10/03/2024	\$1,001 - \$15,000	n/a
10	Joint	--	Age-Based Option 12-13: Moderately Conservative Portfolio	Sale (Full)	11/05/2024	\$50,001 - \$100,000	n/a
11	Joint	--	Age-Based Option 14-15: Conservative Portfolio	Purchase	11/05/2024	\$50,001 - \$100,000	n/a
12	Joint	--	USAA Plan FBO	Sale (Partial)	06/14/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Moderately Aggressive Asset Name Portfolio	Transaction Type	Transaction Date	Amount	Comments
13	Joint	--	USAA Plan FBO Moderate Portfolio	Sale (Partial)	06/14/2024	\$1,001 - \$15,000	n/a
14	Joint	--	Age-Based Option 12-13: Moderately Conservative Portfolio	Sale (Partial)	06/14/2024	\$1,001 - \$15,000	n/a
15	Joint	--	USAA Plan FBO Aggressive Growth Portfolio	Sale (Partial)	06/14/2024	\$1,001 - \$15,000	n/a
16	Joint	--	MA Portfolio 2027 Fidelity Funds	Purchase	01/18/2024	\$1,001 - \$15,000	n/a
17	Joint	--	MA Portfolio 2027 Fidelity Funds	Purchase	02/20/2024	\$1,001 - \$15,000	n/a
18	Joint	--	MA Portfolio 2027 Fidelity Funds	Purchase	03/18/2024	\$1,001 - \$15,000	n/a
19	Joint	--	MA Portfolio 2027 Fidelity Funds	Purchase	04/18/2024	\$1,001 - \$15,000	n/a
20	Joint	--	MA Portfolio 2027 Fidelity Funds	Purchase	05/20/2024	\$1,001 - \$15,000	n/a
21	Joint	--	MA Portfolio 2027 Fidelity Funds	Sale (Partial)	06/14/2024	\$1,001 - \$15,000	n/a
22	Joint	--	MA Portfolio 2027 Fidelity Funds	Purchase	06/18/2024	\$1,001 - \$15,000	n/a
23	Joint	--	MA Portfolio 2027 Fidelity Funds	Purchase	07/18/2024	\$1,001 - \$15,000	n/a
24	Joint	--	MA Portfolio 2027 Fidelity Funds	Purchase	08/19/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Funds		Transaction	Transaction	Amount	Comments
			Asset Name	Type	Date			
25	Joint	--	MA Portfolio	Purchase	09/18/2024	\$1,001 -	n/a	
			2027 Fidelity Funds			\$15,000		
26	Joint	--	MA Portfolio	Purchase	10/18/2024	\$1,001 -	n/a	
			2027 Fidelity Funds			\$15,000		
27	Joint	--	MA Portfolio	Purchase	11/18/2024	\$1,001 -	n/a	
			2027 Fidelity Funds			\$15,000		
28	Joint	--	MA Portfolio	Purchase	12/18/2024	\$1,001 -	n/a	
			2027 Fidelity Funds			\$15,000		
29	Joint	--	Private Equity Co-Investment Partners III LLC	Purchase	02/07/2024	\$1,001 -	n/a	
						\$15,000		
30	Joint	--	TPG Tech Adjacencies II Access LLC	Purchase	05/07/2024	\$1,001 -	n/a	
						\$15,000		
31	Joint	--	Private Equity Co-Investment Partners III LLC	Purchase	06/18/2024	\$1,001 -	n/a	
						\$15,000		
32	Joint	--	Private Equity Co-Investment Partners III LLC	Purchase	10/23/2024	\$1,001 -	n/a	
						\$15,000		
33	Joint	--	Private Equity Co-Investment Partners III LLC	Purchase	11/15/2024	\$1,001 -	n/a	
						\$15,000		
34	Joint	--	TPG Tech Adjacencies II Access LLC	Purchase	12/09/2024	\$1,001 -	n/a	
						\$15,000		
35	Self	--	Bitcoin Miners	Purchase	05/24/2024	\$15,001 -	n/a	
						\$50,000		

## Part 5. Gifts

Did you, your spouse, or dependent child receive any reportable gift during the reporting period? **Yes**

#	Date	Recipient	Gift	Value	From	Comments
1	01/01/2024	Self	Texas Longhorns Football Ticket	\$405.00	Bill Holmes Midland, TX	n/a
2	11/30/2024	Self	Texas Longhorns vs. Texas A&M Aggies Football Ticket	\$1,500.00	Willie Langston Houston, TX	n/a
3	11/30/2024	Spouse	Texas Longhorns vs. Texas A&M Aggies Football Ticket	\$1,500.00	Willie Langston Houston, TX	n/a

## Part 6. Travel

Did you, your spouse, or dependent child receive any reportable travel? **Yes**

#	Date(s)	Traveler(s)	Travel Type	Itinerary	Reimbursed For	Who Paid	Comments
1	01/02/2024	Self	Personal friendship	New Orleans, LA to Cotulla, TX with a layover in Austin, TX to refuel.	Private plane Amount: \$9,480.00	Bill Holmes Midland, TX	n/a

## Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2012	Joint	Other (Margin loan)	-	floating% (on demand)	\$250,001 - \$500,000	Goldman Sachs New York, New York	The floating interest rate is broker call plus 100 basis points.
2	2016	Joint	Mortgage	0	2.65% (7 year ARM)	\$1,000,001 - \$5,000,000	Bank of America Houston, Texas	n/a
3	2019	Joint	Revolving Charge	-	19.49% (NA)	\$50,001 - \$100,000	American Express New York, NY	n/a
4	2015	Joint	Revolving Charge	-	20.24% (NA)	\$50,001 - \$100,000	Chase Wilmington, DE	n/a
5	2023	Joint	Revolving Charge	-	19.49% (NA)	\$15,001 - \$50,000	Chase Wilmington, DE	n/a
6	2021	Joint	Other (Capital Commitment)	-	0% (On Demand)	\$10,001 - \$15,000	Goldman Sachs New York, New York	Private Equity Co-Investment Partners III LLC
7	2021	Joint	Other (Capital Commitment)	-	0% (On Demand)	\$10,001 - \$15,000	Goldman Sachs New York, New York	TPG Tech Adjacencies II Access LLC

## Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **Yes**

#	Position Dates	Position Held	Entity	Entity Type	Comments
1	Dec 2011 to present	Trustee	Free Enterprise Institute Houston, Texas	Nonprofit Organization	n/a

## Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **Yes**

# #	Date Date	Parties Parties Involved	Type Type	Status and Terms Status and Terms	Comments Comments
1	Nov 2002	CEP Investments Holdings Limited Kingston, Jamaica	Other (Promissory note)	Principal sum of \$75,000 plus reasonable rate of interest. Incorporated in B.V.I and operates in Kingston, Jamaica.	n/a
2	Jun 2014	HarperCollins New York, New York	Royalty Agreement	Royalty payments as follows: (\$318,750 guaranteed, payable 6/2016); Hardcover: 15%; Paperback: 7.5%; Mass market paperback: 8% to 150,000 copies; 10% thereafter; Large print hardcover: 10%; Large print paperback: 7.5%; Digital versions: 25% of amounts received.	n/a
3	Jun 2014	Javelin Group LLC Alexandria, Virginia	Other (Literary agent agreement)	15% of all sums received for serving as agent and \$1 per word for collaboration services.	n/a
4	Aug 2003	Texas ERS Austin, TX	Continuing participation in an employee benefit plan	Continuing participation in employee benefit plan. There are no continuing contributions by the employer or employee.	n/a
5	May 2008	Morgan Lewis Houston, TX	Continuing participation in an employee benefit plan	Continuing participation in employee benefit plan. There are no continuing contributions by the employer or employee.	n/a
6	Mar 2020	Regnery Publishing Washington, DC	Royalty Agreement	Advance of \$400,000 payable in 3 installments; Hardcover 15% of net sales; on all net sales to the book trade of Publisher's hardcover editions at a discount of forty-eight percent (48%) or more off Publisher's catalog retail price, Author's royalty shall be reduced by one-half of one percentage point for each one percentage point that the discount exceeds forty-eight percent; Paperback 7.5% of net sales; Sales outside the US 15% net proceeds; e-book 25% of net proceeds	n/a
7	Jan 2022	Regnery Publishing	Royalty Agreement	Advance of \$1,100,000 for two books payable in 4 installments;	n/a

#	Date	Washington, DC Parties Involved	Type	Hardcover 15% of net sales; on all net sales to the book trade of Publisher's hardcopy editions at a discount of forty-eight percent (48%) or more off Publisher's catalog retail price, Author's royalty shall be reduced by one-half of one percentage point for each one percentage point that the discount exceeds forty-eight percent; Paperback 7.5% of net sales; Sales outside the U.S. 15% net proceeds; e-book 25% of net proceeds.	Status and Terms Comments

### Part 10. Compensation

*Only required if you are a candidate or this is your first report* Did any person or entity pay more than \$5,000 to you or for services provided by you? **This is not my first report.**

### Attachments & Comments

*No attachments added.*

*No comments added.*

