



Filing ID #10053968

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Robert B. Aderholt  
**Status:** Member  
**State/District:** AL04

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 08/11/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
60 Acres Land - Hoggleridge [RP] LOCATION: Haleyville, AL, US DESCRIPTION: Asset was part of Internal Revenue Code section 1031 exchange		None	None		<input checked="" type="checkbox"/>
6207 30th Street North [RP] LOCATION: Arlington, VA, US	JT	\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
Alabaster AL Brd of Ed SPL Tax WTS [GS]	SP	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
AMC Entertainment Holdings, Inc. Class A (AMC) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Armada Properties LLC, 100% Interest [OL] LOCATION: Haleyville, AL, US DESCRIPTION: Single member LLC - SP	SP	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Banco Santander, S.A. Sponsored ADR (SAN) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Bankfirst [BA]	DC	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bankfirst [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Bankfirst [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bankfirst - Armadale Properties LLC [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Bankfirst - IRA [IH]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Commercial Building - Highway 5 South [RP]		None	None		<input checked="" type="checkbox"/>
LOCATION: Haleyville, AL, US DESCRIPTION: Asset was part of Internal Revenue Code section 1031 exchange					
Congressional Federal Credit Union [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Elko Mains LLC, 25% Interest [OL]	SP	\$100,001 - \$250,000	Ordinary Business Income, Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Huntsville, AL, US DESCRIPTION: Elko Mains LLC 2004 Old Big Cove Road Huntsville, AL 35801					
Federated Capital Reserves [MF]	JT	Undetermined	None		<input type="checkbox"/>
GlaxoSmithKline PLC (GSK) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Greenbrier Enterprises LLC, 21% Interest [OL]	SP	\$1,000,001 - \$5,000,000	Capital Gains, Dividends, Interest, Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Madison, AL, US DESCRIPTION: Greenbrier Enterprises LLC 9785 Segers Road Madison, AL 35756-3909					
Greenbrier Enterprises LLC, 4% Interest [OL]	DC	\$100,001 - \$250,000	Capital Gains, Dividends, Interest, Ordinary business income, Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Madison, AL, US DESCRIPTION: Greenbrier Enterprises LLC 9785 Segers Road Madison AL 35756-3909					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Guntersville AL Pub Bldg Auth REVS BDS, DHR Project [GS]	SP	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Jasper AL Wtr Wks & Swr Brd IN REV, BDS [GS]	SP	\$50,001 - \$100,000	Capital Gains, Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Lucid Group, Inc. (LCID) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Navistar International Corporation (NAV) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
New York Life Insurance Company [WU]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
DESCRIPTION: Whole life insurance					
NY Life Securities LLC - IRA [IH]		\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Oppenheimer Holdings, Inc. Class A Common Stock (OPY) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Rivian Automotive, Inc. - Class A (RIVN) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Shirleys Dacha LLC, 50% Interest [OL]	SP	\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Huntsville, AL, US					
DESCRIPTION: Shirleys Dacha LLC 2004 Old Big Cove Road Huntsville, AL 35801					
Snap Inc. Class A (SNAP) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Tekla Healthcare Investors (HQH) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Tesla, Inc. (TSLA) [ST]		None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Voya Financial Classic Money Market Fund [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Webull Financial LLC - Cash Account [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
343 Hay Rake Drive [RP]  LOCATION: Madison, AL, US DESCRIPTION: Asset was part of Internal Revenue Code section 1031 exchange		09/27/2022	E	\$250,001 - \$500,000	
60 Acres Land - Hogglerville [RP]  LOCATION: Haleyville, AL, US DESCRIPTION: Asset was part of Internal Revenue Code section 1031 exchange		08/26/2022	E	\$250,001 - \$500,000	
Apple Inc. (AAPL) [ST]  COMMENTS: Purchase of AAPL Stock in three separate transactions on same day. Individual transactions are below the required threshold.		08/26/2022	P	\$1,001 - \$15,000	
Commercial Building - Highway 5 South [RP]  LOCATION: Haleyville, AL, US DESCRIPTION: Asset was part of Internal Revenue Code section 1031 exchange		08/26/2022	E	\$250,001 - \$500,000	
Jasper AL Wtr Wks & Swr Brd IN REV, BDS [GS] [GS]	SP	08/22/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Tesla, Inc. (TSLA) [ST]	DC	12/5/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

\* 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
JT	LoanCare LLC	October 2020	Mortgage on 6207 30th Street North, Arlington, VA	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

## **SCHEDULE G: GIFTS**

None disclosed.

## **SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS**

None disclosed.

## **SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA**

None disclosed.

## **EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**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:** Hon. Robert B. Aderholt , 08/11/2023