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LEGISLATIVE RESOURCE CENTER

2022 APR -6 PH 2: 42

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OFFICE OF THE CLERK FINANCIAL DISCLOSURE REPORT Office of Congressional Ethics

United States House of Representatives

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Step 1: Read the instructions for Parts I through V on the following pages.		
Step 2: For each statement below, check Yes or No to describe your situation.		
I. I have reportable assets or sources of income for myself, my spouse, or my dependent children.	Yes 🔀	No 🔲
II. I have reportable liabilities (debts) for myself, my spouse, or my dependent children.	Yes [No.X
III. I have reportable outside positions for myself.	Yes 🔀	No 🗌
IV. I have reportable agreements or arrangements for myself.	Yes 🗌	No 🔀
V. I have reportable gifts or travel reimbursements for myself, my apouse, or my dependent children.	Yes 🗌	No.X
Step 3: If you selected Yes for <u>any</u> statement, you must describe the reportable interests that you have in Part (I, II, IV, or V) of the form.	the correspo	onding
Step 4: Sign and date the form.		
Step 5: Submit the completed form to the Legislative Resource Center, U.S. House of Representatives, B- Office Building, Washington, DC-20515.	-81 Cannon	House
certify that the statements I have reade on this form and all attached statements are true, complete best of my knowledge.	, and corre	ct to the
Signature of Member Date Dat	ate <i>(mm/dd</i>	(XX)
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Part I: Assets and Income

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
 Assets held for investment or the production of income that ended the reporting period with a value greater than \$1,000. In addition, assets from which more than \$1,000 in income was received during the reporting period. Reportable assets include, but are not limited to: Assets such as stocks, bonds, annuities, trust holdings, partnership interests, life insurance, investment real estate, or a privately-held trade or business Sector mutual funds: those funds invested in a particular industry, business, or location, such as ABC Electronics Fund or XYZ Canada Fund (report the full name of the fund, not just the family fund name) Holdings of retirement plans, such as 401(k)s or IRAs, investment life insurance, or variable annuities (report each holding unless listed in the Do Not Report section) Defined benefit pension plans provided by a former employer (include the name of the employer) 	 Federal Government retirement benefits Thrift Savings Plan Certificates of deposit, savings or checking accounts Term life insurance Money market mutual funds and money market accounts Your personal residence, unless you rent all or part of it out U.S. Government Treasury bonds, bills, notes, and savings bonds Diversified mutual funds, such as ABC Equity Value Fund or XYZ Large Cepital Fund Diversified funds within an employee benefit plan Money owed to you, your spouse, or dependent child by a spouse, parent, sibling, or child
Also Report:	Do Not Report:
 For yourself: (1) all sources of salary, fees, commissions, and other earned income greater than \$1,000, (2) honoraria greater than \$1,000, and (3) other non-investment income such as scholarships, prizes, and gambling income greater than \$1,000 For your spouse: (1) all sources of salary, fees, commissions, and other earned income greater than \$1,000, and (2) honoraria greater than \$1,000 	Dependent child's earned income Veterans' benefits Federal Government salary Social Security benefits

Important Definitions

Diversified Mutual Fund — A mutual fund that does not have a stated policy of concentrating its investments in one industry, business, or single country other than the United States.

Sector Mutual Fund -- A mutual fund that concentrates its investments in an industry, business, single country other than the United States, or bonds of a single state within the United States.

Diversified Fund within an Employee Benefit Plan - An employee benefit plan fund that has a written policy of varying investments without concentration in one industry, business, or single country other than the United States.

Dependent Child – A son, daughter, stepson or stepdaughter who is either unmarried and under age 21 and living in the filer's house, or considered dependent under the U.S. tax code.

Reportable Information - Go to the last page to see examples of how to report assets and income.

Specific stock, bond, sector mutual fund, type/location of real estate, etc. (Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.) Name of Employer or Business; Source of Fees, Commissions, or Honorarta (Include brief description.) You may distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	
' Liberty University - Salary	
* 40 healthcare Solutions - Consulting Fees ; Commissions	
"Commercial Real Estat. Chorthorn Virginia	
1 Louisiana - Pacific (LPX)	

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Part I: Assets and Income

Continuation Page

Specific stock, bond, sector mutual fund, type/location of real estate, etc. (indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.) Name of Employer or Business; Source of Fees, Commissions, or Honoraria (include brief description.) You may distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.		
Tyson Foods (TSN)	口口	
Brinks Co (BCO)		
Steend Desources (SKE)		
' Nokiz Corp (NOK)	а	
"Wells Fargo (WFC)		
	0	
Nisource (NI)		
" Carty Bankshores (CARE)		
" Rio Tinto (RIO)		
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Part II: Liabilities NA

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
Liabilities that exceeded \$10,000 during the reporting period	 Any liability, such as a mortgage, a student loan, or a credit card account, from a financial institution or business entity granted on terms made available to the general public Loans secured by automobiles, household furniture, or appliances, unless the loan exceeds the purchase price of the item it secures Liabilities that you owe to your spouse or to the parent, sibling, or child of you, your spouse, or your dependent child

Reportable Information - Go to the last page to see examples of how to report liabilities.

Name of creditor (include city and state where creditor is located)	Type of liability (personal loan, margin account, etc.)	
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7		
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10	·	

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Part III: Outside Positions

Report for Yourself:	Do Not Report:
 All positions outside the U.S. Government held at any time during the reporting period, whether or not you were compensated and whether or not you currently hold that position. Positions include an officer, director, employee, trustee, general partner, proprietor, representative, executor, or consultant of any of the following: 	Any position with a Religious entity Social entity Fratemal entity Political entity
Corporation, partnership, trust, or other business entity Non-profit or volunteer organization Educational institution State or Local Government	Any position held by your spouse or dependent child Any position that you hold as pert of your official duties

Reportable Information - Go to the last page to see examples of how to report outside positions.

Organization (include city and state where organization is located)	Type of organization	Position	No longer held
Liberty University Lynchburg, Virginis 2 4c Health Southers	Educational Institution	University Down	
Wilmington, Delenare	Corpration	Board Momber	
3 WA Grensen Institute Charlettes ville, Vinginia	Edvarhonal Helitahai	Road Member	
" Virginia Early Childhood Furtestion	Kon. profit	Bood Monber	
Charmand Virginia Charman Presbyfman Church Charman Virginia	Non-profit	Trastee	
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Part IV: Agreements or Arrangements

NA

Report Your Agreements or Arrangements for:	Do Not Report:
 Centinuing participation in an employee pension or benefit plan maintained by a current or former employer A leave of absence Future employment, including date you accepted employment offer Continuation of payment by a current or former employer (including severance payments) 	 Any agreement or arrangement retated to your employment by the Federal Government Spouse's and dependent child's agreements or arrangements Continuing participation in a defined contribution plan, such as a 401(k) plan, to which a former employer is no longer making contributions

Reportable Information - Go to the last page to see examples of how to report agreements and arrangements.

Entity with which you have an agreement or arrangement (include city and state where entity is located)	Terms of Agreement or Arrangement
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Part V: Gifts and Travel Reimbursements N

Report for Yourself, Spouse, and Dependent Child:	Do Not Report:
 Any gifts or travel reimbursements (items such as lodging, transportation, and food) totaling more than \$415" from any one source during the reporting period; include where you traveled, the purpose, and date(s) of the trip for travel gifts and reimbursements 	Anything received from relatives, the U.S. Government, D.C., state, or local governments Bequests and other forms of inheritance
* If you received more than one gift from one source: 1. Determine the value of each item you received from that source 2. Ignore each item valued at \$166 or less 3. Add the value of those items valued at more than \$166; If the total is more than \$415, then you must list those items on this form	Gifts and travel reimbursements given to your office in connection with your official travel Gifts of hospitality (food, lodging, entertainment) at the donor's residence or personal premises Anything received by your spouse or dependent child totally independent of their relationship to you

Reportable Information - Go to the last page to see examples of how to report gifts and travel reimbursements.

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EXAMPLES

Part I: Assets and Income

Specific stock, bond, sector mutual fund, type/location of real estate, etc. (Indicate the full name of each specific asset or investment. You may add the ticker symbol to the full name.)	No longer held
Name of Employer or Business; Source of Fees, Commissions, or Honoraria (include brief description.)	
You may distinguish any entry for a family member by preceding it with S for spouse, DC for dependent child, or J for jointly held. Do not include actual names.	
OGC Communications (OGC) (Example of a stock with a ticker symbol)	
OGE Energy (Example of sold stock that produced more than \$1,000 in income)	
(S) OGE Energy bond (Example of a corporate bond held by a spouse)	
ABC Healthcare Fund (Example of a sector fund held in a 401(k) plan)	
Residential real estate, Anchorage, AK (Example of Investment real estate)	
Bryggadune University - salary (Example of earned income from a former employer)	
(S) Express Medical Clinic – salary (Example of a spouse's earned income from a current employer)	
Association of Accountants - honorarium (Example of a single honorarium from the listed source)	

Part II: Liabilities

Name of creditor (city and state)	Type of liability (personal loan, margin account, etc.)
John Jones (Denver, CO)	Personal loan from a friend
ANW Investment Company (San Francisco,	Margin account
CA)	

Part III: Outside Positions

Organization (city and state)	Type of organization	Position	No longer held
Bryggadune University (Memphis, TN)	Educational institution	Professor	⊠
ISK Family Trust (Boynton Beach, FL)	Family Trust	Trustee	
Scenic Rivers Association (Nashville, TN)	Non-profit environmental organization	Member, Board of Directors	×

Part IV: Agreements or Arrangements

Entity with which you have an agreement or arrangement (include city and state where entity is located)	Terms of Agreement or Arrangement
Des, Jones & Smith (San Diego, CA)	I will continue to participate in this defined benefit plan (Example of continuing participation in a defined benefit plan with a former employer)
Hartford & Brown (San Diego, CA)	Employment agreement with Hartford & Brown. Starting work as attorney in July 2022. Entered into agreement in October 2021. (Example of an agreement for future employment)

Part V: Gifts and Travel Reimbursements

Source	Description
Dee, Jones & Smith	Leather briefcase
	(Example of a gift totaling more than \$415 from one source)
CGH Culinary Institute	Airline ticket, hotel room, and meals incident to culinary seminar in Tokyo.
	Japan from May 1-5, 2021 (Example of a travel reimbursement)