



Filing ID #10015614

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Michael C. Burgess
Status: Member
State/District: TX26

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2016
Filing Date: 07/13/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
26 Acres Glenwood, AR <small>LOCATION: Glenwood, AR, US DESCRIPTION: Sale at \$28,000 loss after improvements</small>	JT	None	None		<input checked="" type="checkbox"/>
30 Acres 2000 Blackjack, Aubrey, TX <small>LOCATION: Aubrey, TX, US</small>	JT	\$250,001 - \$500,000	Farming income	None	<input type="checkbox"/>
4637 Ivanhoe Dr., Fort Worth, TX <small>LOCATION: Fort Worth, TX, US DESCRIPTION: paid off in 2014, not held for investment and generates no income</small>	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
American Airlines Group, Inc. (AAL)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Compass Bank <small>DESCRIPTION: non-interest paying checking account</small>	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
Dale Operating Gas Lease <small>LOCATION: multiple counties, TX, US</small>		None	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Capital Appreciation	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Cash Reserves	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Contrafund	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Export and Multinational	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity International Discovery	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares MSCI Austria Capped Investable Market Index Fund (EWO)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
L Brands, Inc. (LB)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
MetLife, Inc. (MET)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1987-whole		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1988-whole		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1989-whole		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991b-whole		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991-whole		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-90 Life 1997-whole	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual Life Ins Co		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Note Receivable 1: Wise Co Prop, Lewisville, TX		None	None		<input type="checkbox"/>
DESCRIPTION: note receivable decreased in value due to bankruptcy of the debtor, no payments received					
OPKO Health Inc. (OPK)		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Penn West Petroleum Ltd (PWE)		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Point Bank		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: checking account					
PowerShares Zacks Micro Cap (PZI)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Southwest Airlines Company (LUV)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Alcatel-Lucent (ALU)	SP	None	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: total sale, no proceeds					
Spouse's Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX)	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Berkshire Hathaway Inc. New (BRK.B)	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Fidelity Adv. Series - Equity Growth Fund	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Pfizer, Inc. (PFE)	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Stryker Corporation (SYK)	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
TD Ameritrade Insured Deposit		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Purchase					
Titan Operating Gas Lease		None	None		<input type="checkbox"/>
LOCATION: multiple counties, TX, US					
Toyota Motor Corporation (TM)	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vantage Energy Operating Gas Lease	JT	None	royalty income	None	<input type="checkbox"/>
LOCATION: multiple counties, TX, US					
Wells Fargo Bank Deposit Sweep Combined	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo IRA ⇒ Abbott Laboratories (ABT)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ AbbVie Inc. (ABBV)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ AT&T Inc. (T)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Berkshire Hathaway Inc. New (BRK.B)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Cigna Corporation (CI)		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Express Scripts Holding Company (ESRX)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Fidelity Adv. Series - Equity Growth Fund		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Ford Motor Company (F)		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ General Electric Company (GE)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Intel Corporation (INTC)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ International Business Machines Corporation (IBM)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo IRA ⇒ iShares TIPS Bond ETF (TIP)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Merck & Company, Inc. Common Stock (MRK)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Microsoft Corporation (MSFT)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Nokia Corporation Sponsored American Depositary Shares (NOK)		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Penn West Petroleum Ltd (PWE)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Southwest Airlines Company (LUV)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Stryker Corporation (SYK)		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Texas Instruments Incorporated (TXN)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Time Warner Inc. New (TWX)		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Walt Disney Company (DIS)		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wright Patterson Congressional Credit Union		\$1,001 - \$15,000	None		<input type="checkbox"/>

* Asset class details available at the bottom of this form.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
26 Acres Glenwood, AR	JT	10/3/2016	S	\$100,001 - \$250,000	<input type="checkbox"/>
LOCATION: Glenwood, AR, US					
DESCRIPTION: Sale at \$28,000 loss after improvements					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Spouse's Wells Fargo IRA ⇒ Alcatel-Lucent (ALU)	SP	01/14/2016	S	\$7.00	<input type="checkbox"/>
DESCRIPTION: total sale, no proceeds					

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Trustee (retired member)	Medical Center of Lewisville, Texas
Honorary Adjunct Professor	UNT Health Science Center at Fort Worth

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2010	Self / World Net Daily	Publishing Contract

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Alliance for Health Reform and the Commonwealth Fund	03/11/2016	03/13/2016	Dallas, TX - Middleburg, VA - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Spouse's Wells Fargo IRA (Owner: SP)
- Wells Fargo IRA

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. Michael C. Burgess , 07/13/2017