



Filing ID #10002108

# FINANCIAL DISCLOSURE REPORT

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Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

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## FILER INFORMATION

**Name:** Mr. Alan Nunnelee  
**Status:** Member  
**State/District:** MS01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2013  
**Filing Date:** 05/14/2014

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Allied Funeral Associates, Inc.	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Funeral Home					
Allied Funeral Holdings	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Funeral Home					
Allied Funeral Insurance PA	JT	\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Funeral Home					
American Funds		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Bancorp South	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Black Rock Equity Fund (held in MS Deferred Compensation Plan - MS Senate)		\$1,001 - \$15,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Boston Co. Mid-Cap (held in MS Deferred Compensation Plan - MS Senate)		\$1,001 - \$15,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fayez Saraform Fund (held in MS Deferred Compensation Plan - MS Senate)		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Mississippi Public Employees Retirement System	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Mississippi Public Employees Retirement System		\$50,001 - \$100,000	None		<input type="checkbox"/>
Mississippi Supplemental Legislative Retirement Plan		\$15,001 - \$50,000	None		<input type="checkbox"/>

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
American Funds		01/1/2013	P	\$1,001 - \$15,000	
Fidelity Diversified (held in MS Deferred Compensation Plan - MS Senate)		01/1/2013	S	\$1,001 - \$15,000	<input type="checkbox"/>

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Jackson and Campbell Attorneys at Law (Washington, DC)	Spouse Salary	N/A
Allied Funeral Associates, Inc. (Tupelo, MS)	Consultant Fee	\$26,955

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Wells Fargo	1996	Mortgage on 1816 Woodside Circle, Tupelo, MS	\$100,001 - \$250,000
JT	Reasant	2001	Mortgage on 1816 Woodside Circle, Tupelo, MS	\$15,001 - \$50,000
JT	Green Tree	1997	Mortgage on 342 Indian Summer, Clinton, MS	\$15,001 - \$50,000
JT	Community Bank	2009	Mortgage on 342 Indian Summer,	\$15,001 - \$50,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
Clinton, MS				
JT	Wells Fargo	2013	Mortgage on 72 Quest Valley, Tupelo, MS	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Allied Funeral Holdings (Tupelo, MS)
Director	Allied Funeral Insurance Agency PA (Tupelo, MS)
Director	Allied Funeral Associates, Inc. (Tupelo, MS)
Director	Allied Funeral Associates Insurance, Inc. (Tupelo, MS)

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details				Inclusions		
Source	Start Date	End Date	Itinerary	Lodging?	Food?	Family?
Heritage Foundation	02/6/2013	02/8/2013	Washington, D.C. - Baltimore, MD - Jackson, MS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mississippi Bar Association	07/11/2013	07/14/2013	Washington, DC - Destin, FL - Washington, DC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
American-Israeli Education Foundation	08/10/2013	08/18/2013	Memphis - Israel - Memphis	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

## COMMENTS

## 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:** Mr. Alan Nunnelee , 05/14/2014