



Filing ID #10023221

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. William Hurd  
**Status:** Member  
**State/District:** TX23

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2017  
**Filing Date:** 05/15/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Mutual Funds ⇒ American Century Heritage [MF]  DESCRIPTION: Held by LPL Financial		\$1,001 - \$15,000	Capital Gains	None	<input type="checkbox"/>
Mutual Funds ⇒ American Century Heritage [MF]  DESCRIPTION: Held by LPL Financial		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Mutual Funds ⇒ Artisan Mid Cap Value [MF]  DESCRIPTION: Held by LPL Financial		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Artisan Mid-Cap [MF]  DESCRIPTION: Owned by LPL Financial		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Mutual Funds ⇒ Devenir [IH]  DESCRIPTION: Held by LPL Financial		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Mutual Funds ⇒ Franklin Rising [MF]  DESCRIPTION: Held by LPL Financial		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Mutual Funds ⇒ Franklin Rising Dividends [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Held by LPL Financial					
Mutual Funds ⇒ Ivy Asset Strat [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Held by LPL Financial					
Mutual Funds ⇒ Ivy Asset Strat [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Held by LPL Financial					
Mutual Funds ⇒ Oppenheimer Developing Markets [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Held by LPL Financial					
Mutual Funds ⇒ Oppenheimer Developing Markets [MF]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Held by LPL Financial					
Mutual Funds ⇒ Royce Dividend Value [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Held by LPL Financial					
Mutual Funds ⇒ Royce Dividend Value [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Held by LPL Financial					
Mutual Funds ⇒ Thornburg Income Builder [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Held by LPL Financial					
Mutual Funds ⇒ Thornburg Income Builder IRA [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Mutual Funds ⇒ US Global Investors Global Resources [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Held by LPL Financial					
Mutual Funds ⇒ US Global Investors Global Resources IRA [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Held at LPL Financial					

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

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	Days at Own Exp.	Lodging?	Food?	Family?
Consumer Technology Association	01/6/2018	01/8/2018	DC - Las Vegas - DC	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

o Mutual Funds
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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. William Hurd , 05/15/2018