



Filing ID #10004050

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Mr. Lee Terry  
**Status:** Member  
**State/District:** NE02

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2013  
**Filing Date:** 09/2/2014

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of the West 401K ⇒ Bank of the West 401K	SP	\$1 - \$1,000	Tax-Deferred	None	<input type="checkbox"/>
DESCRIPTION: 401-K for Robyn Terry when she was employed by BoW. No longer employed with BoW, have not moved the account. Now self employed as Realtor.					
City of Omaha Pension ⇒ City of Omaha Pension		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Pension based on 7 years of employment with City of Omaha. No income or benefits currently being paid.					
Jack Terry CSP ⇒ College Savings Plan of Nebraska-Fund 60 Age Based		\$1,001 - \$15,000	None		<input type="checkbox"/>
LOCATION: NE					
Jack Terry UTMA ⇒ M Fund-Growth Fund of America		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	<input type="checkbox"/>
Jack Terry UTMA ⇒ M Fund-Income Fund of America		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	<input type="checkbox"/>
Jack Terry UTMA ⇒ M Fund-Money Market		\$1,001 - \$15,000	Capital Gains, Dividends,	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Interest					
Lee Terry Individual Investment Account ⇒ Pinnacle West Capital Corporation (PNW)		None	Capital Gains, Dividends, Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Sale of stock and close of account to fund College tuition.					
Lee Terry IRA ⇒ Bank Deposit Sweep		\$1,001 - \$15,000	None		<input type="checkbox"/>
Lee Terry IRA ⇒ Berkshire Hathaway Inc. New (BRK.B)		\$50,001 - \$100,000	None		<input type="checkbox"/>
Lee Terry IRA ⇒ General Electric Company (GE)		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	<input type="checkbox"/>
Lee Terry IRA ⇒ M Fund-Income Fund of America		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	<input type="checkbox"/>
Nolan Terry CSP ⇒ College Savings Plan of Nebraska-Fund 20 Age Based		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
LOCATION: NE DESCRIPTION: "Purchase" (deposit into CSP) \$2800.00					
Nolan Terry UTMA ⇒ M Fund-American Mutual	DC	None	Capital Gains, Dividends, Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Sell to cash out UTMA for School/Car					
Nolan Terry UTMA ⇒ M Fund-Income Fund of America	DC	None	Capital Gains, Dividends, Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Sell to cash out for School/Car					
Ryan Terry CSP ⇒ College Savings Plan of Nebraska-Fund 60 Age Based		\$1,001 - \$15,000	None		<input type="checkbox"/>
LOCATION: NE					
Ryan Terry UTMA ⇒ M Fund-Growth Fund of America	DC	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	<input type="checkbox"/>
Ryan Terry UTMA ⇒ M Fund-Income Fund of America	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ryan Terry UTMA ⇒ M Fund-Money Market	DC	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	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?
Lee Terry Individual Investment Account ⇒ Pinnacle West Capital Corporation (PNW)		05/7/2013	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sale of PNW from ordinary investment account to cash out for college tuition. Original purchase date 9/1/06 thru dividend reinvestment plan. \$2284.52 sale price.					

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Terry Salerno	Passive Lee Terry PC residual income	\$214
Bank of the West	Spouse Employment	\$12,282
Lee Terry for Congress	Spouse Wages for Bookkeeping	\$6,000

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	First National Bank-Omaha	12/31/13	Credit Card	\$15,001 - \$50,000
JT	Security State Bank-Ainsley, NE	December 2010	Mortgage on Primary Residence	\$250,001 - \$500,000
COMMENTS: Assessed Value \$305,000 Appx Bal \$ 265,000				

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	Lodging?	Food?	Family?
Turkish Government	04/27/2013	05/1/2013	Chicago - Istanbul - Chicago	<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

- Bank of the West 401K (Owner: SP)  
DESCRIPTION: Small benefit received as a part time employee of BoW. Funded for less than a year. No longer an employee of BoW
- City of Omaha Pension  
DESCRIPTION: Small pension that was funded while employed by the City of Omaha. Have not and am not, collected any funds from this asset
- Jack Terry CSP  
LOCATION: NE  
DESCRIPTION: Lee Terry listed as owner per law
- Jack Terry UTMA  
LOCATION: Omaha, NE, US  
DESCRIPTION: Jack Terry Savings
- Lee Terry Individual Investment Account  
LOCATION: Omaha, NE, US  
DESCRIPTION: General Investment Account-Managed and Advised by Bonnett Wealth Management-Jerome Bonnett
- Lee Terry IRA  
DESCRIPTION: IRA set up during private practice managed by Financial Planner Bonnett Wealth Management-Jerome Bonnett
- Nolan Terry CSP  
LOCATION: NE  
DESCRIPTION: Lee Terry listed as owner per law
- Nolan Terry UTMA (Owner: DC)  
LOCATION: Omaha, NE, US  
DESCRIPTION: Nolan Terry Savings-Zero balance: school tuition and books, school extra curricular, purchased car in Fall 2013
- Ryan Terry CSP  
LOCATION: NE  
DESCRIPTION: Lee Terry listed as owner per law
- Ryan Terry UTMA (Owner: DC)  
LOCATION: Omaha, NE, US  
DESCRIPTION: Ryan Terry Savings

## 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. Lee Terry , 09/2/2014