

UNITED STATES HOUSE OF REPRESENTATIVES

2014 FINANCIAL DISCLOSURE STATEMENT

For Use by Members, Officers, and Employees

Form A

HAND
DELIVERED Page 1 of 16

LEGISLATIVE RESOURCE CENTER

2015 MAY 14 PM 3:08

OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES

(Office Use Only)

Name: WILLIAM H. "BILLY" LONG, II

Daytime Telephone: _____

FILER STATUS	<input checked="" type="checkbox"/> Member of or Candidate for U.S. House of Representatives	State: <u>MO</u> District: <u>7</u>	<input type="checkbox"/> Officer or Employee	Employing Office: _____
	<input checked="" type="checkbox"/> 2014 Annual (Due: May 15, 2015)	<input type="checkbox"/> Amendment	<input type="checkbox"/> Termination	Date of Termination: _____

PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <u>or</u> b. Make more than \$200 in unearned income from any reportable asset during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	G. Did you, your spouse, or your dependent child receive any reportable gift(s) totaling more than \$375 in value from a single source during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	H. Did you, your spouse, or your dependent child receive any reportable travel or reimbursements for travel totaling more than \$375 in value from a single source during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	I. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"	

IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER EACH OF THESE QUESTIONS

IPO - Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
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 that benefits you, your spouse, or your dependent child?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
EXEMPTION - Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

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Use additional sheets if more space is required

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Schedule A - Assets and "Unearned Income"

Asset and/or Income Source	Value of Asset												Type of Income	Amount of Income											Transaction
	A	B	C	D	E	F	G	H	I	J	K	L		I	II	III	IV	V	VI	VII	VIII	IX	X	XI	
None														None											
\$ 1 - \$ 1,000														\$ 1 - \$ 200											
\$ 1,001 - \$ 15,000														\$ 201 - \$ 1000											
\$ 15,001 - \$ 50,000														\$ 1,001 - \$ 2,500											
\$ 50,001 - \$ 100,000														\$ 2,501 - \$ 5,000											
\$ 100,001 - \$ 250,000														\$ 5,000 - \$ 15,000											
\$ 250,001 - \$ 500,000														\$ 15,001 - \$ 50,000											
\$ 500,001 - \$ 1,000,000														\$ 50,001 - \$ 100,000											
\$ 1,000,001 - \$ 5,000,000														\$ 100,001 - \$ 1,000,000											
\$ 5,000,001 - \$ 25,000,000														\$ 1,000,001 - \$ 5,000,000											
\$ 25,000,001 - \$ 50,000,000														Over \$ 5,000,000											
Over \$ 50,000,000																									

Bank Accounts:

Bancorpsouth, checking account																									
Springfield First Community Bank, WHL Trust																									
SP Ameritrade, money market account																									
SP Springfield First Community Bank, Hith Svgs Acct																									closed

Rental Real Estate:

32 Martin Lane, Dallas County, MO																									
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Stock and Securities:

Fidelity Investments: 133-207446																									
Fidelity Municipal Money Market																									
Alibaba Grp Hldgs																									
Direxion ETF																									
PepperRock Res Corp																									
Southern Co																									

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Asset and/or Income Source७

Schedule A - Assets and "Unearned Income"

Asset and/or Income Source	Value of Asset													Type of Income	Amount of Income											Transaction
	A	B	C	D	E	F	G	H	I	J	K	L		I	II	III	IV	V	VI	VII	VIII	IX	X	XI		
KKR & Co L P Del Com Units													None													
Kinder Morgan Mgmt LLC													\$ 1 - \$ 1,000													
Lowes Corp													\$ 1,001 - \$ 15,000													
Macquarie Infrast Co LLC													\$ 15,001 - \$ 50,000													
Main Street Capital Corp													\$ 50,001 - \$ 100,000													
Market Vectors ETF Tr India Small Cp													\$ 100,001 - \$ 250,000													
Microsoft Corp													\$ 250,001 - \$ 500,000													
Morgan Stanley China A Sh Fd Com													\$ 500,001 - \$ 1,000,000													
Nuveen Muni Opportunity Fd													\$ 1,000,001 - \$ 5,000,000													
Omega Healthcare Invs Inc													\$ 5,000,001 - \$ 25,000,000													
Penn West Petroleum Ltd													\$ 25,000,001 - \$ 50,000,000													
Pinco CP Oppty													Over \$ 50,000,000													
Pinco Income Strat Fd													None													
St Joe Corp													DIVIDENDS													
St Louis Cnty MO Mig Rev Bond													RENT													
Sandridge Mississippian Trust													INTEREST													
Seabridge Gold Inc													CAPITAL GAINS													
Silver Bay Rily Tr REIT													EXCEPTED/BLIND TRUST													
Southern Co													TAX DEFERRED													
Two Harbors Inv Corp													None													
Vale Sa Sp Adr													\$ 1 - \$ 200													
Vanguard Energy Fd													\$ 201 - \$ 1000													
Vanguard Prec Metals & Mining Fd													\$ 1,001 - \$ 2,500													
Vanguard REIT Indx Admiral													\$ 2,501 - \$ 5,000													
Vanguard GNMA Admiral													\$ 5,000 - \$ 15,000													
Vanguard Admtrl Sh Sm Cap Idx													\$ 15,001 - \$ 50,000													
													\$ 50,001 - \$ 100,000													
													\$ 100,001 - \$ 1,000,000													
													\$ 1,000,001 - \$ 5,000,000													
													Over \$ 5,000,000													

S(part)

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Asset and/or Income Source

Vanguard TTL STK MKT Idx
 Verizon Communications
 Waste Management Inc
 Wells Fargo & Co
 Wells Fargo Adv Glb Div Opp Fd
 Western Asset Mgt Cap Cp Reit
 Zweig Total Return Fd Inc
 JT Vanguard Funds, Mutual Funds: 88010950528
 Prime Money Market Fund
 Allergan Inc
 The Walt Disney Co
 JT Wells Fargo Advisors 8853-1907
 Washington Mutual Fd F2
 Legg Mason, Clearbridge Aggressive Gwth Fd
 Principal Fds Inc Midcap Fd
 Russell US Small Cap
 JT Southern Company

Asset and/or Income Source

Fidelity Investments: (SEP) 133-164313

William H. Long, II
 United States House of Representatives
 Financial Disclosure Statement - Form A
 Calendar Year 2014

Schedule A - Assets and "Unearned Income"

Asset and/or Income Source		Value of Asset												Type of Income	Amount of Income											Transaction	
		A	B	C	D	E	F	G	H	I	J	K	L		I	II	III	IV	V	VI	VII	VIII	IX	X	XI		
Thornburg Inv't Tr Income Bldr Fd														None													
Fidelity Investments: 414-229393														\$ 1 - \$ 1,000													
SP Southern Co														\$ 1,001 - \$ 15,000													
SP Fidelity Cash Reserves														\$ 15,001 - \$ 50,000													
														\$ 50,001 - \$ 100,000													
														\$ 100,001 - \$ 250,000													
														\$ 250,001 - \$ 500,000													
														\$ 500,001 - \$ 1,000,000													
														\$ 1,000,001 - \$ 5,000,000													
														\$ 5,000,001 - \$ 25,000,000													
														\$ 25,000,001 - \$ 50,000,000													
														\$ Over \$ 50,000,000													
														None													
														DIVIDENDS													
														RENT													
														INTEREST													
														CAPITAL GAINS													
														EXCEPTED/BLIND TRUST													
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														\$ 1,000,001 - \$ 5,000,000													
														\$ Over \$ 5,000,000													
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	A	B	C	D	E	F	G	H	I	J	K	L		I	II	III	IV	V	VI	VII	VIII	IX	X	XI	
None																									
\$ 1 - \$ 1,000																									
\$ 1,001 - \$ 15,000																									
\$ 15,001 - \$ 50,000																									
\$ 50,001 - \$ 100,000																									
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DIVIDENDS																									
RENT																									
INTEREST																									
CAPITAL GAINS																									
EXCEPTED/BLIND TRUST																									
TAX DEFERRED																									
None																									
\$ 1 - \$ 200																									
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\$ 100,001 - \$ 1,000,000																									
\$ 1,000,001 - \$ 5,000,000																									
Over \$ 5,000,000																									

SP 529 College Savings Account
 Most 529 Acct 545800203-01

Business Interests:

Billy Long, Inc., Sub S Corporation																										
Real Estate Commission Sales																										
3923 E. Glen Abbey Dr., Springfield, MO																										
SP 80% shareholder interest																										
Professional Realty Referral, Inc., S Corporation																										
Real Estate Commission Sales																										
3923E. Glen Abbey Dr., Springfield, MO																										
SP 100% shareholder interest																										

Gift 9/10/13

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Use additional sheets if more space is required.

SCHEDULE B -- TRANSACTIONS

SP, DC, JT	ASSET	Type of Transaction			Check Box if Capital Gain Exceeded \$200	Date	Amount of Transaction										
		PURCHASE	SALE	EXCHANGE			A	B	C	D	E	F	G	H	I	J	
							\$ 1,000	1	-	\$ 15,000	0	0	0				
							\$ 15,000	1	-	\$ 50,000	0	0	0				
							\$ 50,000	1	-	\$ 100,000	0	0	0				
							\$ 100,000	1	-	\$ 250,000	0	0	0				
							\$ 250,000	1	-	\$ 500,000	0	0	0				
							\$ 500,000	1	-	\$ 1,000,000	0	0	0				
							\$ 1,000,000	1	-	\$ 5,000,000	0	0	0				
							\$ 5,000,000	1	-	\$ 25,000,000	0	0	0				
							\$ 25,000,000	1	-	\$ 50,000,000	0	0	0				
							\$ Over			\$ 50,000,000	0	0	0				
	Southern Co	x				5/20/2014	x										
	Southern Co	x				5/22/2014		x									
	Apple Inc	x				5/22/2014		x									
	Walt Disney Company	x				5/23/2014		x									
	Allergen Inc.	x				5/30/2014		x									
	Apple Inc	x				5/30/2014		x									
	Allergen Inc.	x				5/30/2014		x									
	Walt Disney Company	x				5/27/2014		x									
	Southern Company	x				6/5/2014		x									
	Apple Inc	x				7/12/2014		x									
	St Louis City MO Mtg Rev Bond		x			10/7/2014			x								
	Apple Inc	x				10/7/2014		x									
	Alibaba Group Holding Ltd	x				10/22/2014		x									
	Legg Mason Ptnrs Eqty, Aggressive	x				10/22/2014		x									
	Thornburg Invl Tr	x				10/22/2014		x									
	Legg Mason Ptnrs Eqty	x				10/22/2014		x									
	Principal FDS Inc Midcap Fd	x				10/22/2014		x									
	Russell US Small Cap Eqty Fd	x				10/22/2014		x									
	Washington Mutual Fd F2	x				10/24/2014		x									
	Alibaba Group Holding Ltd	x				11/7/2014			x								
	Alibaba Group Holding Ltd	x				11/10/2014			x								
	Alibaba Group Holding Ltd	x				12/3/2014			x								
	Ford Motor Co	x				12/23/2014			x								
	Southern Company	x															

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SCHEDULE C - EARNED INCOME

Name: William A. Billy "Love, II"

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List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. government) totaling \$200 or more during the reporting period. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000. See examples below.

EXCLUDE: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

INCOME LIMITS and PROHIBITED INCOME: The 2014 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$26,955. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) were totally prohibited.

Source (include date of receipt for honoraria)		Type	Amount
Examples:			
Keene State		Approved Teaching Fee	\$8,000
State of Maryland		Legislative Pension	\$18,000
Chil Wier Foundation (Oct. 2)		Spouse Speech	\$1,000
Ontario County Board of Education		Spouse Salary	N/A
<i>1 Page ATTACHED</i>			

William H. Long, II
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Schedule C - Earned Income

Source	Type	Amount
Keller Williams Realty, Inc.	Residual Commissions	6,301
Keller Williams Realty, Inc.	Spouse Residual Commissions	N/A

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[illegible]

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude:** Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature.

[illegible]

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EXCLUDE: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to the filer.

[illegible]

Name: William H. "Bill" Long II Page 16 of 16

Use additional sheets if more space is required.