

# UNITED STATES HOUSE OF REPRESENTATIVES 2016 FINANCIAL DISCLOSURE STATEMENT

Form A  
For Use by Members, Officers, and Employees

Name: William H. "Billy" Long, II

Daytime Telephone: \_\_\_\_\_

FILER STATUS	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: <u>MO</u> District: <u>7</u>	Officer or Employee	Employing Office:	Staff Filer Type: (If Applicable) <input type="checkbox"/> Shared <input type="checkbox"/> Principal Assistant
REPORT TYPE	<input checked="" type="checkbox"/> 2016 Annual (Due: May 15, 2017)	<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? or b. Receive 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 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"/>

**HAND DELIVERED** Page 1 of 22  
LEGISLATIVE RESOURCE CENTER  
2017 MAY 12 PM 5:01  
OFFICE USE ONLY

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

## Page 2 of 22

**Use additional sheets if more space is required.**

William H. Long, II  
 United States House of Representatives  
 Financial Disclosure Statement - Form A  
 Calendar Year 2016

3 of 22

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 - \$ 1,000													
\$ 15,001 - \$ 50,000													\$ 1,001 - \$ 2,500													
\$ 50,001 - \$ 100,000													\$ 2,501 - \$ 5,000													
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\$ 25,000,001 - \$ 50,000,000													Over \$ 5,000,000													
Over \$ 50,000,000																										
None													DIVIDENDS													
													RENT													
													INTEREST													
													CAPITAL GAINS													
													EXCEPTED/BLIND TRUST													
													TAX DEFERRED													
													OTHER TYPES OF INCOME													
None																										
\$ 1 - \$ 200																										
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\$ 1,000,001 - \$ 5,000,000																										
Over \$ 5,000,000																										

Bank Accounts:

JT Bancorpsouth, checking account																										
JT Springfield First Community Bank																										
JT Congressional Federal Credit Union, Checking																										
JT Congressional Federal Credit Union, Savings																										
SP Springfield First Community Bank, Hlth Svcs Acct																										

Mortgage Note Receivable:

JT Kathy and Shawn Whitman, Fair Grove, MO																										
--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Oil Interest

JT Resource Strategies LLC																										
----------------------------	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Stock and Securities:

JT Fidelity Investments: 133-207446																										
Fidelity Government Money Market																										
Fidelity Municipal Money Market																										
Lumber Liquidators Hlths Inc																										
Direxion ETF																										
PepperRock Res Corp																										
Southern Co																										
JT Stocks Held, Scottrade 52562691																										
Money Balance																										
Allergan Inc																										
Alpine Total Dynamic Dvld Fd																										

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	
American Capital Agcy Corp	X												None												S
Annaly Capital Mgt Inc	X												\$ 1 - \$ 1,000												S
Apollo Investment Mgmt	X												\$ 1,001 - \$ 15,000												S
Apple Inc	X												\$ 15,001 - \$ 50,000												S
Atmos Energy Corp	X												\$ 50,001 - \$ 100,000												S
Bank of America Corp	X												\$ 100,001 - \$ 250,000												S
Blackstone Group LP Com Units	X												\$ 250,001 - \$ 500,000												S
Core Clarion Global Real Est	X												\$ 500,001 - \$ 1,000,000												S
Camden Shareholder Yield ETF	X												\$ 1,000,001 - \$ 5,000,000												S
Capital One Finl Corp	X												\$ 5,000,001 - \$ 25,000,000												S
Caterpillar Inc	X												\$ 25,000,001 - \$ 50,000,000												S
Centerpoint Energy	X												\$ 50,000,001 - \$ 1,000,000,000												S
Chimera Inv Corp Com	X												\$ 1,000,000,001 - \$ 5,000,000,000												S
Citigroup Inc	X												\$ 5,000,000,001 - \$ 25,000,000,000												S
ConocoPhillips	X												\$ 25,000,000,001 - \$ 50,000,000,000												S
Digital Globe Inc	X												\$ Over \$ 50,000,000,000												S
Dorchester Mineral LP Units	X												None												S
Enerplus Res Ord (CND)	X												DIVIDENDS												S
Freeport McMoran Inc	X												RENT												S
Graham Field Health Products	X												INTEREST												S
Intel Corporation	X												CAPITAL GAINS												S
J P Morgan Chase & Co	X												EXCEPTED/BLIND TRUST												S
KKR & Co L P Del Com Units	X												TAX DEFERRED												S
Kinder Morgan Mgmt LLC	X												OTHER TYPES OF INCOME												S
Lowes Corp	X												None												S
Macquarie Infrastr Co LLC	X												\$ 1 - \$ 200												S
													\$ 201 - \$ 1000												S
													\$ 1,001 - \$ 2,500												S
													\$ 2,501 - \$ 5,000												S
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													\$ 500,000,000,000,000,000,000,000,000,001 - \$ 1,000,000,000,000,000,000,000,000,000,000												S
													\$ 1,000,000,000,000,000,000,000,000,000,001 - \$ 5,000,00												

5 of 22

**Asset and/or Income Source**Page 3 of 6

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	
Wells Fargo & Co													None												
Wells Fargo Adv Gbl Div Opp Fd													\$ 1 - \$ 1,000												S
Western Asset Mgt Cap Cp Reit													\$ 1,001 - \$ 15,000												S
Zweig Total Return Fd Inc													\$ 15,001 - \$ 50,000												S
JT Vanguard Funds, Mutual Funds: 88010950528													\$ 50,001 - \$ 100,000												S
Prime Money Market Fund													\$ 100,001 - \$ 250,000												
Allergan Inc													\$ 250,001 - \$ 500,000												
The Walt Disney Co													\$ 500,001 - \$ 1,000,000												
JT Wells Fargo Advisors 8853-1907													\$ 1,000,001 - \$ 5,000,000												
Washington Mutual Fd F2													\$ 5,000,001 - \$ 25,000,000												
Legg Mason, Clearbridge Aggressive Gwth Fd													\$ 25,000,001 - \$ 50,000,000												
Principal Fds Inc Midcap Fd													\$ Over \$ 50,000,000												
Russell US Small Cap																									S(Partial)
JT Southern Company																									S(Partial)
<b>Insurance Policies</b>																									
MetLife Insurance Co. of Connecticut																									
Interest Sensitive Whole Life, Cash Value																									
<b>Individual Retirement Accounts:</b>																									
Fidelity Investments: (SEP) 133-164313																									S
Allergan Inc																									S
Apple Inc																									S
Annaly Capital Mgmt Inc																									
Cdex Inc Cl A																									

William H. Long, II  
 United States House of Representatives  
 Financial Disclosure Statement - Form A  
 Calendar Year 2016

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	
Chesapeake Energy Corp																									P.S.
Disney Walt Co																									S
Fidelity Cash Reserves																									P
Ford Motor Co																									P.S.
Graham Field Health Products Inc																									P.S.
Kinder Morgan Mgmt LLC																									P.S.
KKR & Co LP																									P.S.
Linnco, LLC Com																									P.S.
Linn Energy LLC																									P.S.
MGM Resorts Intl																									P
Monsanto Co																									
Nextpath Technologies Inc																									
SCAC Hldgs Corp New																									
Southern Company																									
Fidelity Investments: (fRA) 2AX-343196																									
Fidelity Magellan Fund																									
Vanguard Prime Money Market Fund 88019867049																									
Prime Money Mkt Fund																									
Apple Inc																									
Wells Fargo Advisors: (4143-5730)																									
Bank Deposit Sweep																									
Centurylink Inc																									
Kinder Morgan Mgmt LLC																									
Legg Mason, Clearbridge Tactical																									
Omega Healthcare REIT Invest Inc																									
The Southern Company																									

70422

William H. Long, II  
United States House of Representatives  
Financial Disclosure Statement - Form A  
Calendar Year 2016

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 Magellan Stk Fnd													\$ 15,001 - \$ 50,000												
SP Fidelity Cash Reserves													\$ 50,001 - \$ 100,000												
Business Interests:														OTHER TYPES OF INCOME											
Billy Long, Inc., Sub S Corporation													None												
Real Estate Commission Sales													DIVIDENDS												
3923 E. Glen Abbey Dr., Springfield, MO													RENT												
SP 80% shareholder interest													INTEREST												
Professional Realty Referral, Inc., S Corporation													CAPITAL GAINS												
Real Estate Commission Sales													EXCEPTED/BLIND TRUST												
3923E. Glen Abbey Dr., Springfield, MO													TAX DEFERRED												
SP 100% shareholder interest																									
BCL Homes, Sole Proprietor																									
3923 E. Glen Abbey Dr., Springfield, MO																									
SP 100% interest																									

New 9/9/2016

New 9/9/2016



Name: William H. "Bully" Long, Jr. Page 9 of 22

**Use additional sheets if more space is required.**

10 of 22

[illegible]

## Type of Transaction

[illegible]

12 of 22

**SCHEDULE B -- TRANSACTIONS**[illegible]

13 of 22

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[illegible]

15 of 22

SCHEDULE B -- TRANSACTIONS

SP, DC, JT	ASSET	Type of Transaction				Check Box if Capital Gain Exceeded \$200	Date	Amount of Transaction										
		PURCHASE	SALE	PARTIAL SALE	EXCHANGE			A	B	C	D	E	F	G	H	I	J	
								\$ 1,000 1 - \$ 15,000 0	\$ 15,000 1 - \$ 50,000 0	\$ 50,000 1 - \$ 100,000 0	\$ 100,000 1 - \$ 250,000 0	\$ 250,000 1 - \$ 500,000 0	\$ 500,000 1 - \$ 1,000,000 0	\$ 1,000,000 1 - \$ 5,000,000 0	\$ 5,000,000 1 - \$ 25,000,000 0	\$ 25,000,000 1 - \$ 50,000,000 0	\$ Over \$ 50,000,000 0	
	Chesapeake Energy Corp		X			X	4/12/2016	X										
	Lumber Liquidators Holdings, Inc		X			X	4/13/2016	X										
	Chesapeake Energy Corp						4/27/2016											
	Chesapeake Energy Corp						5/3/2016											
	Lumber Liquidators Holdings, Inc						5/2/2016											
	Monosoto Company						5/19/2016											
	Lumber Liquidators Holdings, Inc						6/17/2016											
	Chesapeake Energy Corp						8/5/2016											
	Chesapeake Energy Corp						8/15/2016											
	Monosoto Company						9/15/2016											
	Ford Motor Co						9/28/2016											
	Ford Motor Co						12/16/2016											
	Ford Motor Co						8/22/2016											
	Washington Mutual Fd F2						8/22/2016											
	Legg Mas Clearbridge Aggressive Gwth Fd						8/22/2016											
	Principal Fds Inc Midcap Fd						8/22/2016											
	Russell US Small Cap						8/22/2016											

Page 16 of 22

**INCOME LIMITS and PROHIBITED INCOME:** The 2016 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$27,495. The 2017 limit is \$27,765. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited.

[illegible]



**William H. Long, II**  
**United States House of Representatives**  
**Financial Disclosure Statement - Form A**  
**Calendar Year 2016**

**Schedule C - Earned Income**

Source	Type	Amount
Keller Williams Realty, Inc.	Residual Commissions for Services Rendered Prior to House Employment	21,061
Keller Williams Realty, Inc.	Spouse Residual Commissions	N/A

# SCHEDULE D - LIABILITIES

Name: WILLIAM H "BILLY" LONG, II

Page 18 of 22

Report liabilities of over \$10,000 owed to any one creditor **at any time** during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. **Members:** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. \*Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability										
				A	B	C	D	E	F	G	H	I	J	K
				\$10,001-\$15,000	\$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	Over \$1,000,000* (Spouse/DC Liability)
Example	First Bank of Wilmington, DE	5/98	Mortgage on Rental Property, Dover, DE				X							
	1 PAGE ATTACHED													

# SCHEDULE E - POSITIONS

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.

Position	Name of Organization
NA	NA

William H. Long, II  
 United States House of Representatives  
 Financial Disclosure Statement - Form A  
 Calendar Year 2016

19 of 22

Schedule D - Liabilities

SP, DC, JT	Creditor	Date Liability Incurred Mo/Year	Type of Liability	Amount of Liability									
				A	B	C	D	E	F	G	H	J	
				\$ 1 0 0 0 0 1	\$ 1 5 0 0 0 0								
				\$ 1 5 0 0 1	\$ 5 0 0 0 0								
				\$ 5 0 0 0 0	\$ 0 0 0 0 0								
				\$ 1 0 0 0 0 1	\$ 2 5 0 0 0 0								
				\$ 2 5 0 0 0 1	\$ 5 0 0 0 0 0 0								
				\$ 5 0 0 0 0 1	\$ 1 0 0 0 0 0 0								
				\$ 1 0 0 0 0 0 1	\$ 5 0 0 0 0 0 0								
				\$ 5 0 0 0 0 0 1	\$ 2 5 0 0 0 0 0 0								
				\$ 2 5 0 0 0 0 0 1	\$ 5 0 0 0 0 0 0 0								
				\$ O v e r	\$ 5 0 0 0 0 0 0 0								
JT Ozark Bank, Ozark, MO		2/1/2005	Loan secured by personal residence This loan was paid off 2016										
SP SFC Bank, Springfield, MO		9/9/2016	Line of Credit Business Loan BCL Homes										

# **SCHEDULE F - AGREEMENTS**

Name: WILLIAM H "BILLY" LONG, II

Page 20 of 22

Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement
	NA	NA

# **SCHEDULE G - GIFTS**

Report the source (by name), a brief description, and the value of all gifts totaling more than \$375 received by you, your spouse, or your dependent child from any source during the year. **Exclude:** Gifts from relatives; gifts of personal hospitality from an individual; local meals; and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of \$150 or less need not be added towards the \$375 disclosure threshold. **Note:** The gift rule (House Rule 25, clause 5) prohibits acceptance of gifts except as specifically provided in the rule.

Source	Description	Value
Example: Mr. Joseph Smith, Arlington, VA	Silver Platter (determination of personal friendship received from the Ethics Committee)	\$400
NA	NA	

Name: William "Billy" Long II Page 21 of 22

**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]

**Use additional sheets if more space is required**

**SCHEDULE I – PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA**

Name: William H. "Billy" Love, II

Page 22 of 22

List the source, activity (i.e., speech, appearance, or article), date, and amount of any payment made by the sponsor of an event to a charitable organization in lieu of paying an honorarium to you. A separate confidential list of charities receiving such payments must be filed directly with the Committee on Ethics.

[illegible]