



Filing ID #10022079

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Michael C. Burgess  
**Status:** Member  
**State/District:** TX26

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2017  
**Filing Date:** 08/6/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
30 Acres 2000 Blackjack, Aubrey, TX [RP]  LOCATION: Aubrey, TX, US	JT	\$250,001 - \$500,000	Farming income	None	<input type="checkbox"/>
4637 Ivanhoe Dr., Fort Worth, TX [RP]  LOCATION: Fort Worth, TX, US DESCRIPTION: paid off in 2014, not held for investment and generates no income	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
American Airlines Group, Inc. (AAL) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Brighthouse Financial, Inc. (BHF) [ST]  DESCRIPTION: Brighthouse Financial Inc is a spinoff from the Metlife Inc. Amount is less than the reporting threshold.	SP	\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Capital One Investing Cash Balance [BA]	SP	\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Compass Bank [BA]  DESCRIPTION: non-interest paying checking account	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Dale Operating Gas Lease [RP]		None	None		<input type="checkbox"/>
LOCATION: multiple counties, TX, US					
Fidelity Capital Appreciation [MF]	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Cash Reserves [BA]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Contrafund [MF]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Export and Multinational [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity International Discovery [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares MSCI Austria Capped Investable Market Index Fund (EWO) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
L Brands, Inc. (LB) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
MetLife, Inc. (MET) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1987-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1988-whole [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1989-whole [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991b-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-90 Life 1997-whole [WU]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual Life Ins Co [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Note Receivable 1: Wise Co Prop, Lewisville, TX [DO]		None	None		<input type="checkbox"/>
DESCRIPTION: note receivable decreased in value due to bankruptcy of the debtor, no payments received					
Obsidian Energy Ltd. (OBE) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: formerly PENN WEST PETROLEUM LTD					
OPKO Health Inc. (OPK) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Point Bank [OT]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: checking account					
PowerShares Zacks Micro Cap (PZI) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Southwest Airlines Company (LUV) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Fidelity Adv. Series - Equity Growth Fund [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Pfizer, Inc. (PFE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Stryker Corporation (SYK) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
TD Ameritrade Insured Deposit [BA]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Money Market					
Titan Operating Gas Lease [RP]		None	None		<input type="checkbox"/>
LOCATION: multiple counties, TX, US					
Toyota Motor Corporation (TM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vantage Energy Operating Gas Lease [RP]  LOCATION: multiple counties, TX, US	JT	None	royalty income	None	<input type="checkbox"/>
Wells Fargo Bank Deposit Sweep Combined [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo IRA ⇒ Abbott Laboratories (ABT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ AbbVie Inc. (ABBV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Cigna Corporation (CI) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Express Scripts Holding Company (ESRX) [ST]		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Fidelity Adv. Series - Equity Growth Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Ford Motor Company (F) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ General Electric Company (GE) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ International Business Machines Corporation (IBM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ iShares TIPS Bond ETF (TIP) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Nokia Corporation Sponsored American Depositary Shares (NOK) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Obsidian Energy Ltd. (OBE) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: formerly Penn West Petroleum LTD					
Wells Fargo IRA ⇒ Southwest Airlines Company (LUV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Stryker Corporation (SYK) [ST]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Texas Instruments Incorporated (TXN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Time Warner Inc. New (TWX) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Walt Disney Company (DIS) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wright Patterson Congressional Credit Union [BA]		\$1 - \$1,000	None		<input type="checkbox"/>

\* 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

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Ciera Bank	March 2017	Loan	\$100,001 - \$250,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
Honorary Adjunct Professor	UNT Health Science Center at Fort Worth
Member of the Board	University of North Texas Foundation

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
October 2010	Self / World Net Daily	Publishing Contract

**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?
The Heritage Foundation	02/8/2017	02/10/2017	Washington, DC - New York City, NY - Dallas, Texas	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
American Enterprise Institute (AEI)	03/10/2017	03/12/2017	Washington, DC - Sea Island, GA - Dallas, Texas	0	<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**

<ul style="list-style-type: none"> <li>Spouse's Wells Fargo IRA (Owner: SP)</li> <li>Wells Fargo IRA</li> </ul>
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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. Michael C. Burgess , 08/6/2018