



Filing ID #10006293

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Luke Messer  
**Status:** Member  
**State/District:** IN06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2014  
**Filing Date:** 05/15/2015

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
119 S. Vine Street		\$50,001 - \$100,000	None		<input type="checkbox"/>
LOCATION: Greensburg, IN, US					
2022 Enrollment Portfolio Class A	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: IN					
2025 Enrollment Portfolio Class A	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: IN					
345 W. Broadway Street	JT	\$100,001 - \$250,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Shelbyville, IN, US					
Church, Church, Hittle & Antrim Retirement Plan ⇒ American Funds 2040 Target Date Fund R4	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Citibank - Checking	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Citibank - Savings	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
College Choice 529 Plan ⇒ Adv 29 Core Bond Index Class A		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
College Choice 529 Plan ⇒ Adv 529 Columbia Acorn		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
College Choice 529 Plan ⇒ Adv 529 Large Cap Index Class A		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
College Choice 529 Plan ⇒ Adv. 529 Int. Equ. Index Fd. Class A		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ AMCAP Fund CL C	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ American Mutual Fund Class C	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Bond Fund of America	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Europacific Growth Fund Cl C	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Investment Co. of America Fd. Class A	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ New World Fund class A	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ SMALLCAP World Fund Cl C	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Templeton World Fund class A	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Dynatech Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Flex Cap Growth Fd A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Growth Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones SEP IRA ⇒ Franklin High Income Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Income Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Intl. Sm. Cap. Gr. Class A		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Large Cap Equity Fd. Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Mutual Shares Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Natural Resources Fund Class A		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Real Estate Secs. Fd. Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Rising Dividends Fd. Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Mutual Global Discovery Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Templeton Growth Fund Cl A		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Fifth Third Bank - checking	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Franklin Rising Dividend Fund Class A	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: UTMA for Ava Messer held at Edward Jones.					
Franklin Rising Dividend Fund Class A	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: UTMA for Emma Messer held at Edward Jones					
Franklin Rising Dividend Fund Class A	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: UTMA for Hudson Messer held at Edward Jones					
Mainsource Bank - Checking	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Mainsource Bank - Savings	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<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?
2022 Enrollment Portfolio Class A LOCATION: IN	SP	12/29/2014	P	\$1,001 - \$15,000	
2025 Enrollment Portfolio Class A LOCATION: IN	SP	12/29/2014	P	\$1,001 - \$15,000	
345 W. Broadway Street LOCATION: Shelbyville, IN, US	JT	05/30/2014	S	\$100,001 - \$250,000	<input type="checkbox"/>

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Church, Church, Hittle & Antrim	spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Nelnet	May 1994	Student Loan	\$15,001 - \$50,000
JT	Mainsource Bank, Shelbyville, IN	Dec 2012	Mortgage on residence, McLean, VA	\$500,001 - \$1,000,000
SP	Audi Financial	October 2014	Car Loan	\$15,001 - \$50,000
JT	Mainsource Bank, Shelbyville, IN	Dec. 2011	Mortgage on residence, Dandridge, TN	\$50,001 - \$100,000

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	Days at Own Exp.	Lodging?	Food?	Family?
Education and Workforce Committee	08/17/2014	08/23/2014	Washington, DC - New Dehli, India - Warsaw, Poland - Vilnius, Lithuania - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Foreign Affairs Committee	02/15/2014	02/24/2014	Washington, DC - Tokyo, Japan - Seoul, Korea - Taipei, Taiwan - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Church, Church, Hittle & Antrim Retirement Plan (Owner: SP)
- College Choice 529 Plan  
LOCATION: IN  
DESCRIPTION: 529 Plan for the Benefit of Emma Messer.
- Edward Jones (SEP) IRA - Spouse (Owner: SP)
- Edward Jones SEP IRA

## 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. Luke Messer , 05/15/2015