



Filing ID #10009396

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Michael Bob Starr
Status: Congressional Candidate
State/District: TX19

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2015
Filing Date: 01/8/2016
Period Covered: 01/01/2015– 01/5/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AMS - Wealth Building Tax-Managed ⇒ AIM Short Term Government & Agency Reserves	SP	\$1,001 - \$15,000	None		
AMS - Wealth Building Tax-Managed ⇒ AMG Yacktman Fund Service Class	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
AMS - Wealth Building Tax-Managed ⇒ Fidelity Advisor Mid Cap II Fund Class I	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
AMS - Wealth Building Tax-Managed ⇒ Fidelity Advisor New Insights Fund Class I	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
AMS - Wealth Building Tax-Managed ⇒ Fidelity Spartan 500 Index Fund Investor Class	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
AMS - Wealth Building Tax-Managed ⇒ FPA Crescent Portfolio	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
AMS - Wealth Building Tax-Managed ⇒ Franklin Federal Tax-Free Income Fund Advisor Class	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AMS - Wealth Building Tax-Managed ⇒ Franklin Mutual Global Discovery Fund Class Z	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
AMS - Wealth Building Tax-Managed ⇒ Invesco High Yield Municipal Fund Class Y	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
AMS - Wealth Building Tax-Managed ⇒ Invesco International Growth Fund Class Y	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
AMS - Wealth Building Tax-Managed ⇒ Ivy Asset Strategy Fund Class I	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$1,001 - \$2,500
AMS - Wealth Building Tax-Managed ⇒ Mainstay Marketfield Fund Class I	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
AMS - Wealth Building Tax-Managed ⇒ Oakmark International Small Cap Fund	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	\$201 - \$1,000
AMS - Wealth Building Tax-Managed ⇒ PIMCO Unconstrained Tax Managed Bond Fund Class P	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
AMS - Wealth Building Tax-Managed ⇒ Principal Diversified Real Asset Fund Class P	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
AMS - Wealth Building Tax-Managed ⇒ Royce Total Return Fund Investment Class	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
AMS - Wealth Building Tax-Managed ⇒ Templeton Global Bond Fund Advisor Class	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
AMS IRA - Wealth Building Model ⇒ AIM Short Term Government & Agency Reserves	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ AMG Yacktman Fund Service Class	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Fidelity Advisor Mid Cap II Fund Class I	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Fidelity Advisor New Insights Fund Class I	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AMS IRA - Wealth Building Model ⇒ Fidelity Spartan 500 Index Fund Investor Class	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ FPA Crescent Portfolio	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Franklin Mutual Global Discovery Fund Class Z	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Invesco International Growth Fund Class Y	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Ivy Asset Strategy Fund Class I	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Loomis Sayles Bond Fund Institutional Class	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Mainstay Marketfield Fund Class I	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Metropolitan West Total Return Bond Fund Class I	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Oakmark International Small Cap Fund	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ PIMCO Total Return Fund Class P	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Principal Diversified Real Asset Fund Class P	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Royce Total Return Fund Investment Class	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Scout Unconstrained Bond Fund Class I	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS IRA - Wealth Building Model ⇒ Templeton Global Bond Fund Advisor Class	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Acadian Emerging Markets Fund Institutional		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Class					
AMS Roth - Core Aggressive Growth Model ⇒ Acadian Emerging Markets Fund Institutional Class	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ AIM Short Term Government and Agency Reserves	SP	\$1 - \$1,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ AIM Short Term Government and Agency Reserves		\$1 - \$1,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ AMG Managers Skyline Special Equities Fund		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ AMG Managers Skyline Special Equities Fund	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ AMG Yacktman Fund Service Class	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ AMG Yacktman Fund Service Class		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Fidelity Advisor Growth Opportunities Fund Class		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Fidelity Advisor Growth Opportunities Fund Class	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Fidelity Spartan 500 Index Fund Investor Class	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Fidelity Spartan 500 Index Fund Investor Class		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Invesco International Growth Fund Class Y		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Invesco International Growth Fund Class Y	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ivy Asset Strategy Fund Class I					
AMS Roth - Core Aggressive Growth Model ⇒ Ivy Asset Strategy Fund Class I		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ JOHCM International Select Fund Class I		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ JOHCM International Select Fund Class I	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Oakmark Global Select Fund Class I	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Oakmark Global Select Fund Class I		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Oberweis International Opportunities Fund Class I		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Oberweis International Opportunities Fund Class I	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Pear Tree Polaris Foreign Value Small Cap Fund Institutional Shares	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Pear Tree Polaris Foreign Value Small Cap Fund Institutional Shares		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Principal Diversified Real Asset Fund Class P		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Principal Diversified Real Asset Fund Class P	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Touchstone Sands Capital Select Growth FD Class Y	SP	\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ Touchstone Sands Capital Select Growth FD Class		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Y					
AMS Roth - Core Aggressive Growth Model ⇒ William Blair Small Mid Cap Growth Fund Class I		\$1,001 - \$15,000	Tax-Deferred		
AMS Roth - Core Aggressive Growth Model ⇒ William Blair Small Mid Cap Growth Fund Class I	SP	\$1,001 - \$15,000	Tax-Deferred		
First Command Bank	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Invesco Summit Fund	JT	\$1 - \$1,000	Capital Gains, Dividends, Sale (2015)	\$5,001 - \$15,000	\$2,501 - \$5,000
Liberty National Life Insurance Company		\$100,001 - \$250,000	None		
Liberty National Life Insurance Company	SP	\$100,001 - \$250,000	None		
Pioneer Disciplined Growth Fund	JT	\$1 - \$1,000	Capital Gains, Dividends, Sale (2015)	\$5,001 - \$15,000	\$1,001 - \$2,500
Pioneer Solutions Balanced Fund	DC	\$15,001 - \$50,000	Tax-Deferred		
Pioneer Solutions Growth Fund	DC	\$1,001 - \$15,000	Tax-Deferred		

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Abilene Christian School	Spouse salary	N/A	N/A
Defense Finance & Accounting Service (Military Pay)	Salary	N/A	N/A
COMMENTS: Income from military pay is not reportable on Schedule C.			

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	USAA Savings Bank	January 2016	Revolving charge account	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- AMS - Wealth Building Tax-Managed (Owner: SP)
LOCATION: US
- AMS IRA - Wealth Building Model (Owner: SP)
DESCRIPTION: Beneficiary IRA
- AMS Roth - Core Aggressive Growth Model
- AMS Roth - Core Aggressive Growth Model (Owner: SP)

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Michael Bob Starr , 01/8/2016