



Filing ID #10004862

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Lee Terry  
**Status:** Former Member  
**State/District:** NE02

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2015  
**Filing Date:** 02/2/2015

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of the West 401K ⇒ Bank of the West 401k	SP	\$1 - \$1,000	None		<input type="checkbox"/>
City of Omaha Pension ⇒ City of Omaha Pension		\$1,001 - \$15,000	None		<input type="checkbox"/>
Jack Terry CSP ⇒ CSP-NE Age-based 19+		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
LOCATION: NE					
Jack Terry UTMA ⇒ American Funds-Jack Terry UTMA	DC	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	None	<input type="checkbox"/>
Jack Terry UTMA ⇒ Growth Fund of America	DC	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	<input type="checkbox"/>
Jack Terry UTMA ⇒ Income Fund of America	DC	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	<input type="checkbox"/>
Lee Terry IRA ⇒		\$50,001 -	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Berkshire Hathaway Inc. New (BRK.B)		\$100,000			
Lee Terry IRA ⇒ Charles Schwab-Bank Deposit Sweep		\$1,001 - \$15,000	None		<input type="checkbox"/>
Lee Terry IRA ⇒ General Electric Company (GE)		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Lee Terry IRA ⇒ Income Fund of America		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Nolan Terry CSP ⇒ CSP-NE Age-based 19+		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
LOCATION: NE					
Ryan Terry CSP ⇒ CSP-NE Age-based 19+		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
LOCATION: NE					
Ryan Terry UTMA ⇒ American Funds-Ryan Terry UTMA	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ryan Terry UTMA ⇒ Growth Fund of America	DC	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	<input type="checkbox"/>
Ryan Terry UTMA ⇒ Income Fund of America	DC	\$1,001 - \$15,000	Capital Gains, Dividends, 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?
Jack Terry CSP ⇒ CSP-NE Age-based 11-14		11/14/2014	P	\$1,001 - \$15,000	
LOCATION: NE					
Nolan Terry CSP ⇒ CSP-NE Age-based 19+		01/6/2014	P	\$1,001 - \$15,000	
LOCATION: NE					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Nolan Terry CSP ⇒ CSP-NE Age-based 19+		02/3/2014	S	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: NE DESCRIPTION: Check issued to UNL Bursar for Tuition/Room/Board pymt					
Ryan Terry CSP ⇒ CSP-NE Age-based 15-18		11/14/2014	P	\$1,001 - \$15,000	
LOCATION: NE					

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

## SCHEDULE C: EARNED INCOME

Source	Type	Amount
CBSHome Real Estate	Spouse-Commissions	\$4,192.74

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	FNB-Omaha	Entire Calendar 2014	Credit Card	\$15,001 - \$50,000
JT	Amex	Entire Calendar 2014	Credit Card	\$10,000 - \$15,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2014	Hon. Lee R. Terry and Kelley, Drye & Warren LLP	Annual Salary \$275,000 plus Benefits

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Bank of the West 401K (Owner: SP)  
DESCRIPTION: Small benefit received as a part time employee of BoW. Funded for less than a year. No longer an employee of BoW
- City of Omaha Pension  
DESCRIPTION: Small pension that was funded while employed by the City of Omaha. Have not and am not, collected any funds from this asset
- Jack Terry CSP  
LOCATION: NE  
DESCRIPTION: Lee Terry listed as owner per law
- Jack Terry UTMA (Owner: DC)  
LOCATION: Omaha, NE, US  
DESCRIPTION: Jack Terry Savings
- Lee Terry IRA  
DESCRIPTION: IRA set up during private practice managed by Financial Planner Bonnett Wealth Management-Jerome Bonnett
- Nolan Terry CSP  
LOCATION: NE  
DESCRIPTION: Lee Terry listed as owner per law
- Ryan Terry CSP  
LOCATION: NE  
DESCRIPTION: Lee Terry listed as owner per law
- Ryan Terry UTMA (Owner: DC)  
LOCATION: Omaha, NE, US  
DESCRIPTION: Ryan Terry Savings

## 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

## COMMENTS

## 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. Lee Terry , 02/2/2015