

UNITED STATES HOUSE OF REPRESENTATIVES FINANCIAL DISCLOSURE STATEMENT FOR CALENDAR YEAR 2007

FORM A Page 1 of 8
For use by Members, officers, and employees

HAND DELIVERED

Kevin Patrick Brady
(Full Name)

202-225-4901
(Daytime Telephone)

0008 JUN -4 PM 5:38

LEGISLATIVE RESOURCE CENTER

Filer Status ☒ Member of the U.S. House of Representative

State: TX District 8

☐ Officer Or Employee

Office Use Only
A \$200 penalty shall be assessed against anyone who files more than 30 days late.

Report Type

☒ Annual (May 15)

☐ Amendment

☐ Termination

Termination Date:

PRELIMINARY INFORMATION -- ANSWER EACH OF THESE QUESTIONS

I. Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 or more from any source in the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VI. Did you, your spouse, or a dependent child receive any reportable gift in the reporting period (i.e., aggregating more than \$305 and not otherwise exempt)?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If yes, complete and attach Schedule I.		If yes, complete and attach Schedule VI.	
II. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article in the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	VII. Did you, your spouse, or a dependent child receive any reportable travel or reimbursements for travel in the reporting period (worth more than \$305 from one source)?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
If yes, complete and attach Schedule II.		If yes, complete and attach Schedule VII.	
III. Did you, your spouse, or a dependent child receive "unearned" income of more than \$200 in the reporting period or hold any reportable asset worth more than \$1,000 at the end of the period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VIII. Did you hold any reportable positions on or before the date of filing in the current calendar year?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If yes, complete and attach Schedule III.		If yes, complete and attach Schedule VIII.	
IV. Did you, your spouse, or dependent child purchase, sell, or exchange any reportable asset in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	IX. Did you have any reportable agreement or arrangement with an outside entity?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If yes, complete and attach Schedule IV.		If yes, complete and attach Schedule IX.	
V. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>		
If yes, complete and attach Schedule V.			

Each question in this part must be answered and the appropriate schedule attached for each "Yes" response.

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION -- ANSWER EACH OF THESE QUESTIONS

Trusts-- Details regarding "Qualified Blind Trusts" approved by the Committee on Standards of Official Conduct 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 <input type="checkbox"/> No <input checked="" type="checkbox"/>
Exemptions-- 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 <input type="checkbox"/> No <input checked="" type="checkbox"/>

SCHEDULE I - EARNED INCOME

Name Kevin Patrick Brady

Page 2 of 8

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totaling \$200 or more during the preceding calendar year. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000.

Source	Type	Amount
Chase Bank	Exercised stock option from prior employment	\$1,593

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Kevin Patrick Brady

Page 3 of 8

BLOCK A Asset and/or Income Source Identify (a) each asset held for investment or production of income with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other assets or sources of income which generated more than \$200 in "unearned" income during the year. For rental property or land, provide a complete address. Provide full names of stocks and mutual funds (do not use ticker symbols). For all IRAs and other retirement plans (such as 401(k) plans) that are self-directed (i.e., plans in which you have the power, even if not exercised, to select the specific investments), provide the value and income information on each asset in the account that exceeds the reporting threshold. For retirement plans that are not self-directed, name the institution holding the account and its value at the end of the reporting period. For an active business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A. For additional information, see the instruction booklet. Exclude: Your personal residence(s) (unless there is rental income); any debt owed to you by your spouse, or by your or your spouse's child, parent or sibling; any deposits totaling \$5,000 or less in personal savings accounts; any financial interest in or income derived from U.S. Government retirement programs. If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC) or is jointly held (JT), in the optional column on the far left.	BLOCK B Year-End Value of Asset at close of reporting year. If you use a valuation method other than fair market value, please specify the method used. If an asset was sold and is included only because it is generated income, the value should be "None."	BLOCK C Type of Income Check all columns that apply. Check "None" if asset did not generate any income during the calendar year. If other than one of the listed categories, specify the type of income by writing a brief description in this block. (For example: Partnership Income or Farm Income)	BLOCK D Amount of Income For retirement plans or accounts that do not allow you to choose specific investments, you may write "NA" for income. For all other assets, indicate the category of income by checking the appropriate box below. Dividends, even if reinvested, should be listed as income. Check "None" if no income was earned.	BLOCK E Transaction Indicate if asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in reporting year.
Best of American (BOA) Am Cent VP Value I	\$1,001 - \$15,000		NONE	
Best of America (BOA) Drey VIF APP Port	\$1,001 - \$15,000		NONE	
Best of America (BOA) NVIT Mid Cap Index I	\$1,001 - \$15,000		NONE	
Best of America (BOA) Fidelity VIP Equity INCM Port	\$1,001 - \$15,000		NONE	
Best of America (BOA) Lehman BRAMT SHRT DUE BD1 (formerly NEU/BER AMT LMTMATBND PT)	\$1,001 - \$15,000		NONE	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Kevin Patrick Brady

Page 4 of 8

	Best of America (BOA) Oppenheimer Global SECS FDVA IC	\$1,001 - \$15,000		NONE	
	Farmers New World/ Reassure American Life	\$1,001 - \$15,000		NONE	
SP	Chase Investment Services Corp IRA-HPQ stock	\$15,001 - \$50,000	DIVIDENDS	\$1 - \$200	
SP	JP Morgan Chase IRA MMAT	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
SP	JP Morgan Mutual Funds 564/Growth Advantage Fund A	\$1,001 - \$15,000	DIVIDENDS	\$1 - \$200	
JT	JP Morgan/Chase Bank Personal Checking Account/	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
JT	JP Morgan/Chase Bank Super Savings Account	\$1,001 - \$15,000	INTEREST	\$1 - \$200	
SP	JP Morgan/Chase Manhattan Employee Stock	\$1 - \$1,000	DIVIDENDS	\$1 - \$200	
SP	JP Morgan/Chase Retirement Plan	\$50,001 - \$100,000	INTEREST	\$1,001 - \$2,500	
SP	JP Morgan/Chase 401K: Common Stock Fund	\$100,001 - \$250,000	DIVIDENDS	\$2,501 - \$5,000	
SP	JP Morgan/Chase 401K: JP Morgan Fleming Small Cap Core Fund	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500	
SP	JP Morgan/Chase 401K: Causeway Capitol Management Large Cap Core Fund/	\$15,001 - \$50,000	DIVIDENDS	\$1,001 - \$2,500	
SP	JP Morgan/Chase Securities Employee Stock Option Plan	\$1,001 - \$15,000		NONE	

SCHEDULE III - ASSETS AND "UNEARNED" INCOME

Name Kevin Patrick Brady

Page 5 of 8

	Pacific Life VUL	\$1,001 - \$15,000	NONE	
DC	Putnam College Adv Aggressive 1998 A	\$1,001 - \$15,000	NONE	
SP	Putnam IRA Mid-Cap Value Fund A	\$1,001 - \$15,000	DIVIDENDS \$1 - \$200	
JT	Putnam MM Fund A	\$1,001 - \$15,000	DIVIDENDS \$1 - \$200	
JT	Putnam Small Cap Value Fund A	\$1,001 - \$15,000	DIVIDENDS \$1 - \$200	
	Putnam Cap OPPS CL-A IRA	\$1,001 - \$15,000	NONE	
JT	Putnam Growth & Income Fund	\$1,001 - \$15,000	DIVIDENDS \$201 - \$1,000	
	State of Texas Retirement System	\$15,001 - \$50,000	NONE	
DC	Putnam College Adv Aggressive 2000-A	\$1,001 - \$15,000	NONE	
JT	Wells Fargo Checking	\$1 - \$1,000	NONE	P
JT	Wells Fargo Savings	\$1 - \$1,000	\$1 - \$200	P
JT	Woodforest Natinal Bank Checking	\$1 - \$1,000	NONE	P
DC	Woodforest National Bank Savings - minor child	\$1 - \$1,000	\$1 - \$200	P
DC	Woodforest National Bank Savings - minor child	\$1 - \$1,000	\$1 - \$200	P

SCHEDULE IV - TRANSACTIONS

Name Kevin Patrick Brady

Page 6 of 8

Report any purchase, sale or exchange by you, your spouse, or dependent child during the reporting year of any real property, stocks, bonds, commodities futures, or other securities when the amount of the transaction or series of transactions exceeded \$1,000. Include transactions that resulted in a loss. Do not report a transaction between you, your spouse, or your dependent child, or the purchase or sale of your personal residence, unless it is rented out. Provide a

SP, DC, JT	Asset	Type of Transaction	Date	Amount of Transactio
JT	Wells Fargo Checking	P	4-13-07	0 - \$1,000
JT	Wells Fargo Savings	P	4-13-07	0 - \$1,000
DC	Woodforest National Bank Checking	P	1-15-07	0 - \$1,000
JT	Woodforest National Bank Checking	P	1-15-07	0 - \$1,000
DC	Woodforest National Bank Savings - minor child	P	1-15-07	0 - \$1,000
DC	Woodforest National Bank Savings - minor child	P	1-15-07	0 - \$1,000
SP	JP Morgan Chase Employee Stock Option	S(part)	12-4-07	\$1,001 - \$15,000

SCHEDULE V - LIABILITIES

Name Kevin Patrick Brady

Page 7 of 8

Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or dependent child. Mark the highest amount owed during the year. Exclude: Any mortgage on your personal residence (unless all or part of it is rented out); loans secured by automobiles, household furniture, or appliances; and liabilities owed to a spouse, or the child, parent, or sibling of you or your spouse. Report "revolving charge accounts" (i.e., credit cards) only if the balance at the close of the preceding calendar year exceeded \$10,000.

SP, DC, JT	Creditor	Type of Liability	Amount of Liability
JT	Wells Fargo Bank	Home Improvement Loan	\$55,000

SCHEDULE VII - TRAVEL PAYMENTS AND REIMBURSEMENTS

Name Kevin Patrick Brady

Page 8 of 8

Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$305 received by you, your spouse, or a dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense, and the amount of time, if any, that was not at the sponsor's expense. Disclosure is required regardless of whether the expenses were reimbursed or paid directly by the sponsor. 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 (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 you.

Source	Date(s)	Point of Departure-- Destination--Point of Return	Lodging? (Y/N)	Food? (Y/N)	Was a Family Member Included? (Y/N)	Days not at sponsor's expense
Heritage Foundation Republican Study Committee Retreat	Jan 30 - February 1, 2007	Baltimore, MD	Y	Y	N	None