

UNITED STATES HOUSE OF REPRESENTATIVES 2015 FINANCIAL DISCLOSURE STATEMENT

Form A
For Use by Members, Officers, and Employees

HAND DELIVERED

LEGISLATIVE RESOURCE CENTER

2016 MAY 16 PM 2:34

(Office Use Only)

OFFICE OF THE CLERK

U.S. HOUSE OF REPRESENTATIVES

Name: William H. "Billy" Lowery, II Daytime Telephone: 417 839 0061

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

FILER STATUS	<input checked="" type="checkbox"/> Member of or Candidate for U.S. House of Representatives	State: <u>MO</u> District: <u>7</u>	<input type="checkbox"/> Officer or Employee	Employing Office: _____
REPORT TYPE	<input checked="" type="checkbox"/> 2015 Annual (Due: May 16, 2016)	<input type="checkbox"/> Amendment	<input type="checkbox"/> Termination	Date of Termination: _____

PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <u>or</u> b. Make more than \$200 in unearned income from any reportable asset during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	G. Did you, your spouse, or your dependent child receive any reportable gift(s) totaling more than \$375 in value from a single source during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	H. Did you, your spouse, or your dependent child receive any reportable travel or reimbursements for travel totaling more than \$375 in value from a single source during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	I. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"	

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

IPO - Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
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 that benefits you, your spouse, or dependent child?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
EXEMPTION - Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

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Use additional sheets if more space is required

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Schedule A - Assets and "Unearned Income"

Asset and/or Income Source	Value of Asset	Type of Income	Amount of Income	Transaction
Bank Accounts:				
BancoSouth, checking account	None			
Springfield First Community Bank, WHL Trust	\$ 1 - \$ 1,000			
SP Springfield First Community Bank, Hith Svgs Acct	\$ 1,001 - \$ 5,000			
	\$ 15,001 - \$ 50,000			
	\$ 50,001 - \$ 100,000			
	\$ 100,001 - \$ 250,000			
	\$ 250,001 - \$ 500,000			
	\$ 500,001 - \$ 1,000,000			
	\$ 1,000,001 - \$ 2,500,000			
	\$ 2,500,001 - \$ 5,000,000			
	\$ 5,000,001 - \$ 25,000,000			
	\$ 25,000,001 - \$ 50,000,000			
	\$ Over \$ 50,000,000			
	None			
	DIVIDENDS			
	RENT			
	INTEREST			
	CAPITAL GAINS/LOSSES			
	EXCEPTED/BLIND TRUST			
	None			
	\$ 1 - \$ 200			
	\$ 201 - \$ 1,000			
	\$ 1,001 - \$ 2,500			
	\$ 2,501 - \$ 5,000			
	\$ 5,001 - \$ 15,000			
	\$ 15,001 - \$ 50,000			
	\$ 50,001 - \$ 100,000			
	\$ 100,001 - \$ 250,000			
	\$ 250,001 - \$ 500,000			
	\$ 500,001 - \$ 1,000,000			
	\$ 1,000,001 - \$ 5,000,000			
	\$ 5,000,001 - \$ 25,000,000			
	\$ 25,000,001 - \$ 50,000,000			
	\$ Over \$ 50,000,000			
Rental Real Estate:				
32 Martin Lane, Dallas County, MO				S
Stock and Securities:				
Fidelity Investments: 133-207446				
Fidelity Municipal Money Market				
Alibaba Grp Hdgs				
Direxion ETF				
PepperRock Res Corp				
Southern Co				S

Asset and/or Income SourcePage 2 of 7

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Schedule A - Assets and "Unearned Income"

Asset and/or Income Source	Value of Asset	Type of Income	Amount of Income	Transaction
KKR & Co L P Del Com Units				
Kinder Morgan Mgmt LLC				
Lowes Corp				
Macquarie Infrastr Co LLC				
Main Street Capital Corp				
Market Vectors ETF Tr India Small Cp				
MGM Resorts, Inc				
Microsoft Corp				
Morgan Stanley China A Sh Fd Com				
Nuveen Muni Opportunity Fd				
Omega Healthcare Invs Inc				
PJT Partners Inc Cl A				
Penn West Petroleum Ltd				
Pimco CP Oppy				
Pimco Income Stral Fd				
St Joe Corp				
St Louis City MO Mty Rev Bond 7/1/19 8.375%				
Sandridge Mississippian Trust				
Seabridge Gold Inc				
Silver Bay Rlty Tr REIT				
Southern Co				
Two Harbors Inv Corp				
Vale Sa Sp Adr				
Vanguard Energy Fd				
Vanguard Prec Metals & Mining Fd				
Vanguard REIT Indx Admiral				

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Schedule A - Assets and "Unearned Income"

Asset and/or Income Source	Value of Asset	Type of Income	Amount of Income	Transaction
Vanguard GNMA Admiral				
Vanguard Admiral Sh Sm Cap Idx				
Vanguard TTL STK MKT Idx				
Verizon Communications				
Waste Management Inc				
Wells Fargo & Co				
Wells Fargo Adv Gbl Div Opp Fd				
Western Asset Mtg Cap Cp Reit				
Zweig Total Return Fd Inc				
JT Vanguard Funds, Mutual Funds: 88010950528				
Prime Money Market Fund				
Allergan Inc				
The Walt Disney Co				
JT Wells Fargo Advisors 8853-1907				
Washington Mutual Fd F2				
Legg Mason, Clearbridge Aggressive Gwth Fd				
Principal Fds Inc Midcap Fd				
Russell US Small Cap				
JT Southern Company				
Insurance Policies				
MetLife Insurance Co. of Connecticut				
Interest Sensitive Whole Life, Cash Value				

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Schedule A - Assets and "Unearned Income"

Asset and/or Income Source	Value of Asset	Type of Income	Amount of Income	Transaction
	None			
	\$ 1 - \$ 1,000			
	\$ 1,001 - \$ 5,000			
	\$ 5,001 - \$ 50,000			
	\$ 50,001 - \$ 250,000			
	\$ 250,001 - \$ 500,000			
	\$ 500,001 - \$ 1,000,000			
	\$ 1,000,001 - \$ 2,500,000			
	\$ 2,500,001 - \$ 5,000,000			
	\$ 5,000,001 - \$ 25,000,000			
	\$ 25,000,001 - \$ 50,000,000			
	\$ Over \$ 50,000,000			
	None			
	DIVIDENDS			
	RENT			
	INTEREST			
	CAPITAL GAINS			
	EXCEPTED/BLIND TRUST			
	None			
	\$ 1 - \$ 200			
	\$ 201 - \$ 500			
	\$ 501 - \$ 1,500			
	\$ 1,501 - \$ 5,000			
	\$ 5,001 - \$ 10,000			
	\$ 10,001 - \$ 50,000			
	\$ 50,001 - \$ 100,000			
	\$ 100,001 - \$ 500,000			
	\$ 500,001 - \$ 1,000,000			
	\$ 1,000,001 - \$ 5,000,000			
	\$ 5,000,001 - \$ 25,000,000			
	\$ 25,000,001 - \$ 50,000,000			
	\$ Over \$ 50,000,000			

Individual Retirement Accounts:

Fidelity Investments: (SEP) 133-164313

Allergan Inc				
Apple Inc				
Annaly Capital Mgmt Inc				
Cdex Inc Cl A				
Disney Walt Co				
Fidelity Cash Reserves				
Graham Field Health Products Inc				
Kinder Morgan Mgmt LLC				
SCAC Hldgs Corp New				
Southern Company				
Fidelity Investments: (IRA) 2AX-343196				
Fidelity Magellan Fund				
Vanguard Prime Money Market Fund 88019867049				
Prime Money Mkt Fund				
Apple Inc				
Wells Fargo Advisors: (4143-5730)				
Bank Deposit Sweep				
Centurylink Inc				
Kinder Morgan Mgmt LLC				
Legg Mason, Clearbridge Tactical				
Omega Healthcare REIT Invest Inc				
The Southern Company				
Thornburg Inv Tr Income Bldr Fd				

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Schedule A - Assets and "Unearned Income"

Asset and/or Income Source	Value of Asset	Type of Income	Amount of Income	Transaction
	A B C D E F G H I J K L		I II III IV V VI VII VIII IX X XI	
	Non-Real Estate			
	\$ 1 - \$ 1,000		\$ 1 - \$ 200	
	\$ 1,001 - \$ 15,000		\$ 201 - \$ 500	
	\$ 15,001 - \$ 50,000		\$ 501 - \$ 1,000	
	\$ 50,001 - \$ 100,000		\$ 1,001 - \$ 2,500	
	\$ 100,001 - \$ 250,000		\$ 2,501 - \$ 5,000	
	\$ 250,001 - \$ 500,000		\$ 5,001 - \$ 15,000	
	\$ 500,001 - \$ 1,000,000		\$ 15,001 - \$ 50,000	
	\$ 1,000,001 - \$ 5,000,000		\$ 50,001 - \$ 100,000	
	\$ 5,000,001 - \$ 25,000,000		\$ 100,001 - \$ 500,000	
	\$ 25,000,001 - \$ 50,000,000		\$ 500,001 - \$ 1,000,000	
	\$ Over \$ 50,000,000		\$ 1,000,001 - \$ 5,000,000	
	Real Estate			
	DIVIDENDS			
	INTEREST			
	CAPITAL GAINS			
	EXCEPTED/BLIND TRUST			
	TAX DEFERRED			
	NOTY			
	\$ 1 - \$ 200		\$ 1 - \$ 200	
	\$ 201 - \$ 500		\$ 201 - \$ 500	
	\$ 501 - \$ 1,000		\$ 501 - \$ 1,000	
	\$ 1,001 - \$ 2,500		\$ 1,001 - \$ 2,500	
	\$ 2,501 - \$ 5,000		\$ 2,501 - \$ 5,000	
	\$ 5,001 - \$ 15,000		\$ 5,001 - \$ 15,000	
	\$ 15,001 - \$ 50,000		\$ 15,001 - \$ 50,000	
	\$ 50,001 - \$ 100,000		\$ 50,001 - \$ 100,000	
	\$ 100,001 - \$ 500,000		\$ 100,001 - \$ 500,000	
	\$ 500,001 - \$ 1,000,000		\$ 500,001 - \$ 1,000,000	
	\$ 1,000,001 - \$ 5,000,000		\$ 1,000,001 - \$ 5,000,000	
	\$ 5,000,001 - \$ 25,000,000		\$ 5,000,001 - \$ 25,000,000	
	\$ 25,000,001 - \$ 50,000,000		\$ 25,000,001 - \$ 50,000,000	
	\$ Over \$ 50,000,000		\$ 50,000,001 - \$ 500,000,000	

Fidelity Investments: 414-229393

SP Southern Co

SP Fidelity Magellan Stk Fnd

SP Fidelity Cash Reserves

9817

Asset and/or Income Source	Value of Asset	Type of Income	Amount of Income	Transaction
None	A	DIVIDENDS	II	
\$ 1 - \$ 1,000	B	RENT	IV	
	C	INTEREST	V	
\$ 15,001 - \$ 50,000	D	CAPITAL GAINS	VI	
	E	EXCEPTED/BLIND TRUST	VII	
\$ 100,001 - \$ 250,000	F	TAX DEFERRED	VIII	
\$ 250,001 - \$ 500,000	G		IX	
\$ 500,001 - \$ 1,000,000	H		X	
\$ 1,000,001 - \$ 5,000,000	I		XI	
\$ 5,000,001 - \$ 25,000,000	J			
\$ 25,000,001 - \$ 50,000,000	K			
\$ Over \$ 50,000,000	L			

Business Interests:					
Billy Long, Inc., Sub S Corporation Real Estate Commission Sales 3923 E. Glen Abbey Dr., Springfield, MO					
SP 80% shareholder interest Professional Realty Referral, Inc., S Corporation Real Estate Commission Sales 3923E. Glen Abbey Dr., Springfield, MO				X	
SP 100% shareholder interest				X	

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Use additional sheets if more space is required.

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Type of Transaction

[illegible]

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INCOME LIMITS and PROHIBITED INCOME: The 2015 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$27,225. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) were totally prohibited.

Use additional sheets if more space is required.

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Schedule C - Earned Income

Source	Type	Amount
Keller Williams Realty, Inc.	Residual Commissions	13,729
Keller Williams Realty, Inc.	Spouse Residual Commissions	N/A

SCHEDULE D - LIABILITIES

Name: WILLIAM H. "BILLY" LONG, II

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. **Members.** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. *Column K is for liabilities held solely by your spouse or dependent child.

SP, DC, JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability										
				A	B	C	D	E	F	G	H	I	J	K
				\$10,001- \$15,000	\$15,001- \$50,000	\$50,001- \$100,000	\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,001- \$25,000,000	\$25,000,001- \$50,000,000	Over \$50,000,000	Over \$1,000,000* (Spouse/DC Liability)
	<i>Example</i>	5/98	Mortgage on Rental Property, Dover, DE				X							
ST	OZARK BANK, OZARK, MO	2/05	LOAN SECURED BY RESIDENTIAL RESIDENCE						X					

SCHEDULE E - POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude:** Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature.

Position	Name of Organization
NONE	NONE

SCHEDULE F – AGREEMENTS

Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement
	<i>NONE</i>	

SCHEDULE G – GIFTS

Report the source (by name), a brief description, and the value of all gifts totaling more than \$375 received by you, your spouse, or your dependent child from any source during the year. **Exclude:** Gifts from relatives, gifts of personal hospitality from an individual, local meals, and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of \$150 or less need not be added towards the \$375 disclosure threshold. **Note:** The gift rule (House Rule 25, clause 5) prohibits acceptance of gifts except as specifically provided in the rule.

Source		Description	Value
<i>Example:</i>	<i>Mr. Joseph Smith, Arlington, VA</i>	<i>Silver Platter (determination of personal friendship received from the Ethics Committee)</i>	<i>\$400</i>
	<i>NONE</i>		

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List the source, activity (*i.e.*, speech, appearance, or article), date, and amount of any payment made by the sponsor of an event to a charitable organization in lieu of paying an honorarium to you. A separate confidential list of charities receiving such payments must be filed directly with the Committee on Ethics.

[illegible]