

# FINANCIAL DISCLOSURE REPORT

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### FILER INFORMATION

Name: Hon. Glenn Thompson

Status: Member State/District: PA15

## FILING INFORMATION

**Filing Type:** Amendment Report

Filing Year: 2017

**Filing Date:** 08/7/2019

# SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
403(B) ⇒ American Century Value R6 (AVUDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
403(B) ⇒ American Funds AMCAP R5 (RAFFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		П
403(B) ⇒ American Funds EuroPacific Gr R5 (RERFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
403(B) ⇒ Hartford Mid Cap R6 (HFMVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<u>~</u>
$403(B) \Rightarrow$ Standard Stable Asset Fund I [MF]		\$1,001 - \$15,000	Tax-Deferred		
403(B) ⇒ T. Rowe Price Mid-Cap Value (TRMCX) [MF]		\$1,001 - \$15,000	Tax-Deferred		П
National Western Sheltered Fixed Index Annuity [FN]		\$100,001 - \$250,000	Tax-Deferred		
Virgina Street Rental Proerty [RP]	JT	\$100,001 -	Rent	\$5,001 -	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Location: Howard / Centre County, PA, US		\$250,000		\$15,000	
Walnut Street Rental Property [RP]	JT	\$50,001 - \$100,000	Rent	\$5,001 - \$15,000	
LOCATION: Howard / Centre County, PA, US					

## SCHEDULE B: TRANSACTIONS

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
403(B) ⇒ Hartford Mid Cap R6 (HFMVX) [MF]	12/31/2017	P	\$1,001 - \$15,000	
$403(B) \Rightarrow$ Prudential Jennison Mid Cap Growth Z (PEGZX) [MF]	12/31/2017	S	\$1,001 - \$15,000	

## SCHEDULE C: EARNED INCOME

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Туре	Amount of Liability
JT	Northwest Savings, 100 Liberty Street Warren, PA 16365	May 14,2012	Home equity on personal residence	\$50,001 - \$100,000
JT	Northwest Savings, 100 Liberty Street Warren, PA 16365	July 31, 2015	Business Loan for purchase of Virginia Street rental property	\$50,001 - \$100,000
JT	Northwest Savings 100 Liberty Street Warren, PA 16365	July 31, 2015	Home Equity Loan for purchase of Virginia Street rental property	\$50,001 - \$100,000

## **S**CHEDULE **E**: **P**OSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2009	Me and my former employer (Susuquehanna Health) now Susquehanna UPMC	Continue to participate in my former employers provided tax- deferred 403 (B) Pension Plan

### 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

o 403(B)

## 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**

This amendment is to provide clarification on rebalancing transactions as well as asset listings that were initiated by the account manager for my 403(b) plan and not by me.

#### 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. Glenn Thompson, 08/7/2019