



Filing ID #10008156

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2015
Filing Date: 06/27/2015

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
JT	Security State Bank, Ansley, NE	October 2013?	Sole Primary Residence Refinance Mortgage	\$100,001 - \$250,000

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
June 1991	Lee R. Terry and City of Omaha	Vested with the City of Omaha Employees Retirement System for 7 years service as Member of Omaha City Council Incorrectly reported as an Asset in Schedule A of this original Report
COMMENTS: Cash out Value 11,931.44; Monthly Benefit after 1/29/2022 \$354.22		

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

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 , 06/27/2015