



Filing ID #10021363

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Lloyd Doggett
Status: Member
State/District: TX35

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2017
Filing Date: 07/16/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
1157 San Bernard St. [RP] LOCATION: Austin / Travis, TX, US		\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
3800 Kennelwood [RP] LOCATION: Austin / Travis, TX, US		\$250,001 - \$500,000	None		<input type="checkbox"/>
6734 Spicewood Springs [RP] LOCATION: Austin / Travis, TX, US		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Akre Focus Fund (AKRIX) [MF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
American Century Ultra Fund (TWCUX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Berkshire Hathaway Inc. New (BRK.B) [ST]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Coca-Cola Company (KO) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cohen & Steers Pfd Secs @ Inc Cl I (CPXIX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Congressional Federal Credit Union [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DFA Intermediate Term Municipal Bond (DFTIX) [MF]		\$250,001 - \$500,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DFA US Small Cap Value (DFSVX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DL3 Holdings, LLC [RP]		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Austin, TX, US					
DoubleLine Total Return Bond (DBLTX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Driehaus Micro Cap Growth (DMCRX) [MF]		\$250,001 - \$500,000	None		<input checked="" type="checkbox"/>
Evermore Global Value Institutional (EVGIX) [MF]		\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
FPA New Income (FPNIX) [MF]		\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
Franklin High Yield Tax Free Fund (FRHIX/FHT1Z) [MF]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Franklin Mutual Shares Fund [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Hasan Abu-Issa Note (through Mountain States Escrow) [OT]	SP	None	None		<input type="checkbox"/>
DESCRIPTION: promissory note Location: El Paso County, Texas note: fully paid					
Home Depot, Inc. (HD) [ST]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
International Business Machines Corporation (IBM) [ST]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Johnson & Johnson (JNJ) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Kopernik Global All-Cap I (KGGIX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Lazard Global Listed Infrastructure Inst (GLIFX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Mineral Interest, McFarland Tract [RP]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: Ward Co., TX, US					
Nuveen All American Municipal Bond Fund (FAARX) [MF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Nuveen Intermediate Duration Muni Bond (NUVBX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Oakmark Global (OAKGX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Oakmark International (OAKIX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Oakmark Select (OAKLX) [MF]		\$100,001 - \$250,000	Capital Gains	\$15,001 - \$50,000	<input type="checkbox"/>
PIMCO Income Fund (PIMIX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
PPG Industries, Inc. (PPG) [ST]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Procter & Gamble Company (PG) [ST]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Prosperity Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Cash Account					
Schwab Cash IRA Rollover [MF]	SP	\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>
Schwab Govt Money Fund [MF]		\$100,001 - \$250,000	Dividends	\$1 - \$200	<input type="checkbox"/>



Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab Muni Money Fund [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
TIAA-CREF Retirement - Stock Fund [MF]		\$50,001 - \$100,000	None		<input type="checkbox"/>
TIAA-CREF Retirement Global Equities Fund [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
TIAA-CREF Retirement- Real Estate Fund [MF]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Tweedy, Browne Global Value (TBGVX) [MF]		\$250,001 - \$500,000	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Convertible Securities Fund [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Vanguard Energy Fund Investor (VGNEX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard Growth Index Fund Admiral (VIGAX) [MF]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard High Yield Tax Exempt (VWALX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Int. Term Tax-Exempt Fund Admiral (VWIUX) [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Long-Term Corp Admiral (VWETX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard Ltd. Term Tax-Exempt Fund Admiral [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard PRIMECAP Fund Admiral [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Vanguard Selected Value Fund [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Vanguard Short Term Bond [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Small-Cap Index Fund Inv [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard Tax Exempt MM (VMSXX) [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Total Stock Market [MF]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard U.S. Growth Fund Admiral (VWUAX) [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Vanguard Windsor II Fund (VWNAX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Weitz Partners III Opportunity Instl (WPOPX) [MF]		None	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Whole Foods Market, Inc. (WFM) [ST]		None	Capital Gains, Dividends	\$1,000,000.00	<input checked="" type="checkbox"/>
WisdomTree US Dividend Growth ETF (DGRW) [EF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Akre Focus Fund (AKRIX) [MF]		12/15/2017	P	\$1,001 - \$15,000	
American Century Ultra Inv (TWCUX) [MF]		12/19/2017	P	\$15,001 - \$50,000	
Coca-Cola Company (KO) [ST] DESCRIPTION: Reinvest shares		04/3/2017	P	\$1,001 - \$15,000	
Coca-Cola Company (KO) [ST] DESCRIPTION: Reinvest shares		07/3/2017	P	\$1,001 - \$15,000	
Coca-Cola Company (KO) [ST] DESCRIPTION: Reinvest shares		10/3/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Coca-Cola Company (KO) [ST] DESCRIPTION: Reinvest Shares		12/18/2017	P	\$1,001 - \$15,000	
Cohen & Steers Pfd Secs @ Inc Cl I (CPXIX) [MF]		Monthly	P	\$1,001 - \$15,000	
Cohen & Steers Pfd Secs @ Inc Cl I (CPXIX) [MF]		12/26/2017	P	\$15,001 - \$50,000	
DFA Intermediate Term Municipal Bond (DFTIX) [MF]		12/27/2016	P	\$100,001 - \$250,000	
DFA US Small Cap Value (DFSVX) [MF]		12/15/2017	P	\$1,001 - \$15,000	
DoubleLine Total Return Bond I (DBLTX) [MF]		12/27/2017	S (partial)	\$100,001 - \$250,000	
DoubleLine Total Return Bond I (DBLTX) [MF]		12/26/2017	P	\$1,001 - \$15,000	
Driehaus Micro Cap Growth (DMCRX) [MF]		12/26/2017	P	\$250,001 - \$500,000	
Evermore Global Value Institutional (EVGIX) [MF]		12/26/2017	P	\$1,001 - \$15,000	
FPA New Income (FPNIX) [MF]		12/26/2017	P	\$50,001 - \$100,000	
Franklin High Yield Tax Free Fund (FRHIX/FHT1Z) [MF]		02/27/2017	S	\$100,001 - \$250,000	
Franklin High Yield Tax Free Fund (FRHIX/FHT1Z) [MF]		12/26/2017	P	\$50,001 - \$100,000	
Franklin Mutual Shares Fund [MF]		12/22/2018	P	\$15,001 - \$50,000	
Home Depot, Inc. (HD) [ST] DESCRIPTION: Reinvest shares		03/24/2017	P	\$1,001 - \$15,000	
Home Depot, Inc. (HD) [ST] DESCRIPTION: Reinvest shares		06/16/2017	P	\$1,001 - \$15,000	
Home Depot, Inc. (HD) [ST] DESCRIPTION: Reinvest shares		09/15/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Home Depot, Inc. (HD) [ST] DESCRIPTION: Reinvest Shares		12/15/2017	P	\$1,001 - \$15,000	
International Business Machines Corporation (IBM) [ST] DESCRIPTION: Reinvest shares		03/13/2017	P	\$1,001 - \$15,000	
International Business Machines Corporation (IBM) [ST] DESCRIPTION: Reinvest shares		06/13/2017	P	\$1,001 - \$15,000	
International Business Machines Corporation (IBM) [ST] DESCRIPTION: Reinvest Shares		09/12/2017	P	\$1,001 - \$15,000	
International Business Machines Corporation (IBM) [ST] DESCRIPTION: Reinvest Shares		12/12/2017	P	\$1,001 - \$15,000	
Nuveen All American Municipal Bond Fund (FAARX) [MF]		12/26/2017	P	\$100,001 - \$250,000	
Oakmark Global (OAKGX) [MF]		12/26/2017	P	\$15,001 - \$50,000	
PIMCO Income Instal (PIMIX) [MF]		Monthly	P	\$1,001 - \$15,000	
PIMCO Income Instal (PIMIX) [MF]		12/27/2017	P	\$50,001 - \$100,000	
PPG Industries, Inc. (PPG) [ST] DESCRIPTION: Reinvest Shares		09/13/2017	P	\$1,001 - \$15,000	
PPG Industries, Inc. (PPG) [ST] DESCRIPTION: Reinvest Shares		12/13/2017	P	\$1,001 - \$15,000	
Procter & Gamble Company (PG) [ST] DESCRIPTION: Reinvest shares		02/16/2017	P	\$1,001 - \$15,000	
Procter & Gamble Company (PG) [ST] DESCRIPTION: Reinvest shares		05/16/2017	P	\$1,001 - \$15,000	
Procter & Gamble Company (PG) [ST] DESCRIPTION: Reinvest shares		08/16/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Procter & Gamble Company (PG) [ST]		11/15/2017	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest shares					
Tweedy, Browne Global Value (TBGVX) [MF]		12/26/2017	P	\$15,001 - \$50,000	
Vanguard Convertible Securities [MF]		Quarterly	P	\$1,001 - \$15,000	
Vanguard Energy Fund Investor (VGNEX) [MF]		12/20/2017	P	\$1,001 - \$15,000	
Vanguard Growth Index [MF]		Quarterly	P	\$1,001 - \$15,000	
Vanguard High Yield Tax Exempt (VWALX) [MF]		12/27/2017	P	\$50,001 - \$100,000	
Vanguard Long-Term Corp Admiral (VWETX) [MF]		Monthly	P	\$1,001 - \$15,000	
Vanguard PRIMECAP Fund Admiral [MF]		12/18/2017	P	\$50,001 - \$100,000	
Vanguard Selected Value Fund [MF]		Quarterly	P	\$50,001 - \$100,000	
Vanguard Small-Cap Index Fund Inv [MF]		12/20/2017	P	\$1,001 - \$15,000	
Vanguard Total Stock Market [MF]		Quarterly	P	\$1,001 - \$15,000	
Vanguard Windsor II Fund [MF]		12/18/2017	P	\$1,001 - \$15,000	
Vanguard Windsor II Fund [MF]		06/20/2017	P	\$1,001 - \$15,000	
Weitz Partners III Opportunity Instl (WPOPX) [MF]		12/26/2017	S	\$250,001 - \$500,000	<input type="checkbox"/>
Weitz Partners III Opportunity Instl (WPOPX) [MF]		06/28/2017	P	\$1,001 - \$15,000	
Whole Foods Market, Inc. (WFM) [ST]		08/16/2017	S	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
Wisdom Tree US Quality Dividend ETF (DGRW) [MF]		12/26/2017	P	\$100,001 - \$250,000	

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Texas ERS	State Legislative/Judicial Annuity	\$69,995.00
U.S. Dept of Education - (January)	Spouse Salary	N/A
Educational Consultant	Spouse	\$11,500.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Prosperity Bank, Austin (formerly Liberty Bank, Austin)	August 2005	Letter of Credit on 6374 Spicewood Springs	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Aspen Institute Inc (Congressional Program)	04/8/2017	04/18/2017	Austin, Texas - Japan - Korea - Austin, Texas	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

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. Lloyd Doggett , 07/16/2018