



Filing ID #10009534

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Mr. Keith Lee Thurgood
Status: Congressional Candidate
State/District: TX03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2016
Filing Date: 02/2/2016
Period Covered: 01/01/2015– 01/28/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
AAFMA Whole Life Insurance		\$1,001 - \$15,000	Tax-Deferred		
Asset Management Solutions (AMS) ⇒ AMS, Various		\$50,001 - \$100,000	Capital Gains	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: First Command Account					
Bank of America, Carol,		\$1,001 - \$15,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Bank Account					
Blue Star Veterans Network, Options ⇒ Blue Star Veterans Network, Options		\$1,001 - \$15,000	None		
DESCRIPTION: Member of advisory board					
Chase Bank, Checking		\$1 - \$1,000	Interest	None	None
DESCRIPTION: Keith For Congress					
Fidelity Brokerage ⇒ Amdocs Limited - Ordinary Shares (DOX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Brokerage ⇒ Fidelity Brokerage		\$100,001 - \$250,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Fidelity Account, Various					
Fidelity Brokerage ⇒ General Electric Company (GE)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity Brokerage ⇒ Harmony Gold Mining Company Limited (HMY)		\$1 - \$1,000	Capital Gains	None	None
Fidelity Brokerage ⇒ Kohl's Corporation (KSS)		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
Fidelity Brokerage ⇒ Pepsico, Inc. (PEP)		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: stock					
Fidelity Brokerage ⇒ SunEdison, Inc. (SUNE)		\$1 - \$1,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Fidelity Brokerage ⇒ Target Corporation (TGT)		\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity Brokerage ⇒ Wells Fargo & Company (WFC)		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Fidelity Brokerage ⇒ Yum! Brands, Inc. (YUM)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
First Command Bank ⇒ Aviva		Undetermined	Tax-Deferred		
DESCRIPTION: Accordia (Athene) / Aviva					
First Command Bank	JT	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
First Command Bank ⇒ Lifecyle Solutions, National Life Group		Undetermined	Tax-Deferred		
DESCRIPTION: National Life Group is an Indexed Universal Life Insurance policy					
Heber Bank		\$1,001 - \$15,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
MedAssets 401K, Vanguard		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Managed by Vanguard, Various holdings,					
MedAssets, Inc. (MDAS)		\$100,001 - \$250,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Medassets, Vanguard					
Merrill Lynch ⇒ Communications Sales & Leasing, Inc. (CSAL)		\$15,001 - \$50,000	Capital Gains	None	\$1,001 - \$2,500
Merrill Lynch ⇒ Dow Chemical Company (DOW)		\$100,001 - \$250,000	Capital Gains	None	\$1,001 - \$2,500
Merrill Lynch ⇒ Merrill Lynch		\$100,001 - \$250,000	Dividends, Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: Cash and stock account					
Merrill Lynch ⇒ PBG (Pepsico) Stock Options		\$15,001 - \$50,000	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: PBG					
Merrill Lynch ⇒ PBG (Pepsico) Stock Options		\$15,001 - \$50,000	Capital Gains	None	\$5,001 - \$15,000
DESCRIPTION: PBG Options					
Merrill Lynch ⇒ Pepsico		\$100,001 - \$250,000	Capital Gains	None	\$1,001 - \$2,500
DESCRIPTION: Brokerage Account					
Merrill Lynch ⇒ Pepsico Stock Options		\$100,001 - \$250,000	Capital Gains	None	\$100,001 - \$1,000,000
DESCRIPTION: Pepsico Stock Options					
Merrill Lynch ⇒ Windstream Holdings, Inc. (WIN)		\$1,001 - \$15,000	Capital Gains	None	\$1,001 - \$2,500
Morgan Stanley ⇒ Cash		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Stock , Medassets					
Morgan Stanley Cash ⇒ Morgan Stanley		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Cash account					
Pepsico		Undetermined	Pension	\$2,501 - \$5,000	\$2,501 - \$5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Pepsico Pension					
Tempelton High Growth ⇒ Tempelton High Growth		\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
Templeton Foreign Fund ⇒ Templeton Foreign Fund, JT		\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	\$1,001 - \$2,500
Thrift Savings Plan		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: TSP, US Army					
Transamerica		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Carol, IRA, Roth					
Transamerica		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Carol, IRA					
Transamerica		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Keith , IRA Roth					
Transamerica		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Keith, IRA,					
USAA Banking, Checking		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Checking					
USAA Banking, Savings		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Carol, Moon Insurance	Spouse Salary	\$7,000	\$7,000
Medassets	Salary	\$575,000	\$575,000
Executives In Action	Honorarium	\$1,500	\$1,500
American Leadership Academy	Consulting Fee	\$20,000	\$20,000

Source	Type	Amount Current Year to Filing	Amount Preceding Year
IDG	Consulting Fee	\$10,000	\$10,000
Neo Insulation	Consulting Fee	\$35,000	\$35,000
Alpha Insights	Consulting Fee	\$1,000	\$1,000
BYUI (OLL Services)	Adjunct Teaching	\$4,800	\$4,800
Kaplan University	Adjunct Teaching	\$9,200	\$9,200
Thayer Leadership Development Group	Consulting Fee	\$12,500	\$12,500
Thurgood, Royer , Hein	E Commerce (on line sales)	\$1,000	\$1,000
Rental Income, LeLand Lloyd	Rental Income	\$7,200	\$7,200

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Heber Valley Bank	June 2001	Mortgage on rental property	\$250,001 - \$500,000
JT	Visa/MC	Jan 2015 - Dec 2015	Revolving Credit Card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Boy Scouts of America
Board Member	Hire Hereos USA
Board Member	America Futures Series
Advisory Board Member	Blue Star Veterans Network
Chairman of the Board	American Leadership Academy, Texas
Member, Advisory Board	Platform Mfg Group
Member/Partner	Pioneer Partnership Development Group, LLC
Owner	The Novitas Leadership Group, LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
April 2010	PepsiCo	Retirement agreement.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Asset Management Solutions (AMS)
LOCATION: US
DESCRIPTION: First Command , Investment, various stocks
- Blue Star Veterans Network, Options
LOCATION: US
DESCRIPTION: Non vested stock options as member of the advisory board
- Fidelity Brokerage
LOCATION: US
- First Command Bank
LOCATION: US
DESCRIPTION: Bank account
- Merrill Lynch
LOCATION: US
DESCRIPTION: Stock Brokerage Account cash and misc holdings
- Morgan Stanley
LOCATION: US
DESCRIPTION: Cash account
- Morgan Stanley Cash
LOCATION: US
- Tempelton High Growth
LOCATION: US
- Templeton Foreign Fund
LOCATION: US

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Mr. Keith Lee Thurgood , 02/2/2016