



Filing ID #10025061

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. David Alan Brat  
**Status:** Former Member  
**State/District:** VA07

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2019  
**Filing Date:** 01/14/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset                          | Owner | Value of Asset        | Income Type(s) | Income | Tx. > \$1,000?           |
|--------------------------------|-------|-----------------------|----------------|--------|--------------------------|
| Allianz NFJ International [MF] |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/> |
| Oppenheimer Dev. Market [MF]   |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/> |
| T.Rowe Price Health [MF]       |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/> |
| TIAA Real Estate [MF]          |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/> |
| TIAA-CREF Equity Index [MF]    |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/> |
| TIAA-CREF Traditional IRA [IH] |       | \$100,001 - \$250,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Vanguard Energy Fund [MF]      |       | \$15,001 - \$50,000   | Tax-Deferred   |        | <input type="checkbox"/> |
| Vanguard Health Care [MF]      |       | \$50,001 - \$100,000  | Tax-Deferred   |        | <input type="checkbox"/> |
| Vanguard Prime Cap [MF]        |       | \$50,001 -            | Tax-Deferred   |        | <input type="checkbox"/> |

| Asset  | Owner | Value of Asset      | Income Type(s) | Income | Tx. > \$1,000?           |
|--|-------|---------------------|----------------|--------|--------------------------|
|  |       | \$100,000           |                |        |                          |
| Vanguard Total Bond [MF]   |       | \$15,001 - \$50,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| Vanguard Total International Stock [MF]  |       | \$15,001 - \$50,000 | Tax-Deferred   |        | <input type="checkbox"/> |
| VCSP/College America ⇒<br>New Perspective Fund (CNPCX) [5P]<br>LOCATION: VA              |       | None                | Tax-Deferred   |        | <input type="checkbox"/> |
| VCSP/College America ⇒<br>The Income Fund of America (CIMCX) [5P]<br>LOCATION: VA        |       | None                | Tax-Deferred   |        | <input type="checkbox"/> |
| VCSP/College America ⇒<br>The Investment Company of America (CICCX) [5P]<br>LOCATION: VA |       | None                | Tax-Deferred   |        | <input type="checkbox"/> |

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

### SCHEDULE B: TRANSACTIONS

None disclosed.

### SCHEDULE C: EARNED INCOME

| Source           | Type          | Amount |
|------------------|---------------|--------|
| Atalay and Spade | Spouse salary | N/A    |

### SCHEDULE D: LIABILITIES

| Owner | Creditor                          | Date Incurred | Type     | Amount of Liability   |
|-------|-----------------------------------|---------------|----------|-----------------------|
|       | First National Bank Hermitage, PA | May 2017      | Mortgage | \$250,001 - \$500,000 |

### SCHEDULE E: POSITIONS

| Position     | Name of Organization                  |
|--------------|---------------------------------------|
| Board member | Great Aspirations Scholarship Program |

## SCHEDULE F: AGREEMENTS

| Date | Parties To             | Terms of Agreement   |
|------|------------------------|--|
| 1996 | Randolph Macon College | Continuing participation in Benefit Plan maintained by RMC |

## 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

- VCSP/College America  
LOCATION: VA

## 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. David Alan Brat , 01/14/2019