



Filing ID #10001587

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Mr. Luke Messer
Status: Member
State/District: IN06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2013
Filing Date: 05/15/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
119 S. Vine Street		\$50,001 - \$100,000	None		<input type="checkbox"/>
LOCATION: Greensburg, IN, US					
345 W. Broadway Street	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Shelbyville, IN, US					
Church, Church, Hittle & Antrim Retirement Plan ⇒ SP American Funds 2040 Target Date Fund R4		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
College Choice 529 Plan ⇒ Adv 29 Core Bond Index Class A		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
College Choice 529 Plan ⇒ Adv 529 Columbia Acorn		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
College Choice 529 Plan ⇒ Adv 529 Large Cap Index Class A		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
College Choice 529 Plan ⇒ Adv. 529 Int. Equ. Index Fd. Class A		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones (SEP) IRA - Spouse ⇒ American Mutual Fund Class C	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Bond Fund of America	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Europacific Growth Fund Cl C	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Investment Co. of America Fd. Class A	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ New World Fund class A	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ SMALLCAP World Fund Cl C	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Templeton World Fund class A	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Dynatech Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Flex Cap Growth Fd A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Growth Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin High Income Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Income Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Intl. Sm. Cap. Gr. Class A		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Large Cap Equity Fd. Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Mutual Shares Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones SEP IRA ⇒ Franklin Natural Resources Fund Class A		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Real Estate Secs. Fd. Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Rising Dividends Fd. Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Mutual Global Discovery Fund Class A		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Templeton Growth Fund Cl A		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Fifth Third Bank - checking	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Franklin Rising Dividend Fund Class A	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: UTMA for Ava Messer held at Edward Jones.					
Franklin Rising Dividend Fund Class A	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: UTMA for Emma Messer held at Edward Jones					
Franklin Rising Dividend Fund Class A	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: UTMA for Hudson Messer held at Edward Jones					
Mainsource Bank - Checking	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Mainsource Bank - Savings	JT	\$15,001 - \$50,000	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?
Edward Jones (SEP) IRA - Spouse ⇒ Europacific Growth Fund Cl C	SP	10/11/2013	P	\$1,001 - \$15,000	
Edward Jones (SEP) IRA - Spouse ⇒	SP	10/11/2013	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
New World Fund					
Edward Jones (SEP) IRA - Spouse ⇒ SMALLCAP World Fund	SP	10/11/2013	P	\$1,001 - \$15,000	
Edward Jones SEP IRA ⇒ Franklin Flex Cap Growth		12/17/2013	P	\$1,001 - \$15,000	
Edward Jones SEP IRA ⇒ Franklin Flex Cap Growth Fd A		04/12/2013	P	\$15,001 - \$50,000	
Edward Jones SEP IRA ⇒ Franklin Growth Fund Cl A		04/12/2013	P	\$15,001 - \$50,000	
Edward Jones SEP IRA ⇒ Franklin Income Fund Cl A		04/12/2013	P	\$15,001 - \$50,000	
Edward Jones SEP IRA ⇒ Franklin Real Estate Secs Fd A		04/12/2013	P	\$1,001 - \$15,000	
Edward Jones SEP IRA ⇒ Mutual Global Discovery Fd A		04/12/2013	P	\$1,001 - \$15,000	
Edward Jones SEP IRA ⇒ Templeton Growth Fund Cl A		04/12/2013	P	\$1,001 - \$15,000	
Vanguard (Ice Miller 401 (k)) ⇒ Vanguard International Growth Inv		04/1/2013	S	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard (Ice Miller 401 (k)) ⇒ Vanguard Retirement Savings Trust		04/1/2013	S	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard (Ice Miller Retirement Plan) ⇒ Vanguard 500 Index Fund Signal		04/1/2013	S	\$1,001 - \$15,000	<input type="checkbox"/>
Vanguard (Ice Miller Retirement Plan) ⇒ Vanguard Total Bond Market Index Inv		04/1/2013	S	\$15,001 - \$50,000	<input type="checkbox"/>

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Church, Church, Little & Antrim	spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Nelnet	May 1994	Student Loan	\$15,001 - \$50,000
JT	Mainsource Bank, Shelbyville, IN	Dec. 2011	Mortgage on residence, Shelbyville, IN	\$100,001 - \$250,000
JT	Mainsource Bank, Shelbyville, IN	Dec 2012	Mortgage on residence, McLean, VA	\$500,001 - \$1,000,000
JT	Mainsource Bank, Shelbyville, IN	Dec 2011	Home Equity Line of Credit	\$15,001 - \$50,000
SP	Fifth Third Bank, Shelbyville, IN	June 2011	Car Loan	\$15,001 - \$50,000
JT	Mainsource Bank, Shelbyville, IN	Dec. 2011	Mortgage on residence, Dandridge, TN	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

<ul style="list-style-type: none">Church, Church, Hittle & Antrim Retirement Plan (Owner: SP)College Choice 529 Plan LOCATION: IN DESCRIPTION: 529 Plan for the Benefit of Emma Messer.Edward Jones (SEP) IRA - Spouse (Owner: SP)
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- Edward Jones SEP IRA
- Vanguard (Ice Miller 401 (k))
- Vanguard (Ice Miller Retirement Plan)

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

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. Luke Messer , 05/15/2014