



Filing ID #10023049

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Ted Poe  
**Status:** Member  
**State/District:** TX02

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2017  
**Filing Date:** 05/15/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Amerifunds Growth Fund C [MF]	SP	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Amerifunds New World Fund Class C [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Congressional FCU [BA]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Driftwood, TX Real Property [RP]  LOCATION: Driftwood, TX, US DESCRIPTION: Real property including house		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Franklin Federal Tax Free Income C [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Franklin High Yield Class C [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Harris County FCU [BA]		\$250,001 - \$500,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Harris County Texas Judicial Retirement [PE]		\$50,001 -	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$100,000			
Inland America Real Estate Trust [RE]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Ivy Fund Asset Strategy Class C [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Ivy Fund Asset Strategy Class C [MF]		\$15,001 - \$50,000	Capital Gains	\$2,501 - \$5,000	<input type="checkbox"/>
Ivy Fund Asset Strategy Class C [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
MFS Class C [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Money Market Account [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Templeton Global Bond Fund [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Texas County and District Retirement System [PE]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Transamerica Asset Allocation [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Transamerica Asset Allocation [MF]		\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	<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**

None disclosed.

**SCHEDULE C: EARNED INCOME**

Source	Type	Amount
Texas County and District Retirement System	Retirement pension	\$57,229.00
Harris County Texas	Retirement pension	\$84,933.84

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Prosperity Bank Elgin, TX	October 2013	Mortgage Driftwood, TX	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Justice for Children
Board Member, Director	Texas State Society
Board Member	WWI Foundation
Advisory Board Member	Archer Fellowship Program
Board Member	Humble ISD Foundation

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2003	Self & Harris County, TX	Judicial Retirement; continued participation in a benefit plan maintained by a former employer
November 2003	Self & Texas County and District Retirement System	Continued participation in a benefit plan maintained by a former employer.

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?
Organization of Iranian American Communities-US	06/30/2017	07/2/2017	Washington, DC - Paris, France - Houston, Texas	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input 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. Ted Poe , 05/15/2018