



Filing ID #10025101

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2019
Filing Date: 01/27/2019

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, 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	02/23/2018	02/25/2018	Houston, TX - Paris, France - Washington, DC	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 , 01/27/2019