



Filing ID #10025556

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Luke Messer
Status: Former Member
State/District: IN06

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2017
Filing Date: 04/9/2019

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
119 S. Vine Street [RP] LOCATION: Greensburg, IN, US		\$50,001 - \$100,000	None		<input type="checkbox"/>
2022 Enrollment Portfolio Class A [5P] LOCATION: IN DESCRIPTION: More shares bought on 12/27/2016	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
2025 Enrollment Portfolio Class A [5P] LOCATION: IN DESCRIPTION: Bought more shares on 12/27/2016	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Church, Church, Hittle & Antrim Retirement Plan ⇒ American Funds 2040 Target Date Fund R4 [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Citibank - Checking [BA]	SP	None	None		<input type="checkbox"/>
Citibank - Savings [BA]	SP	None	Interest	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
College Choice 529 Plan ⇒ Adv 529 Core Bond Index Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
College Choice 529 Plan ⇒ Adv 529 Large Cap Index Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
College Choice 529 Plan ⇒ Adv. 529 Int. Equ. Index Fd. Class A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
College Choice 529 Plan ⇒ CC ADV 529 Emerg Mkt EQ Indx A [5P] LOCATION: IN		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
College Choice 529 Plan ⇒ Diamond Hill Sm-Mid 529A [5P] LOCATION: IN		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
College Choice 529 Plan ⇒ Emerging Market EQ Indx A [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ AMCAP Fund Cl A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ American Mutual Fund Cl A [MF] DESCRIPTION: Established the position on 9/14/2016	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ American Mutual Fund Cl F1 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ American Mutual Fund Class C [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Capital World Grw & Inc Fund A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Europacific Growth Fund Cl C [MF]	SP	\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Fundamental Investors Fund A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Growth Fund of America Cl A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones (SEP) IRA - Spouse ⇒ Investment Co. of America Fd. Class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ New World Fund class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ SMALLCAP World Fund Cl C [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Templeton World Fund class A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones (SEP) IRA - Spouse ⇒ Washington Mutual Invs Fd Cl A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Dynatech Fund Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Flex Cap Growth Fd A [MF]		None	Tax-Deferred		<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Growth Fund Class A [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Growth Opptys Fd Cl A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin High Income Fund Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Income Fund Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Intl. Sm. Cap. Gr. Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Large Cap Equity Fd. Class A [MF]		None	Tax-Deferred		<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Mutual Global Discovery Fund Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Mutual Shares Fund Class A [MF]		\$50,001 - \$100,000	Tax-Deferred		<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 [MF]		\$1,001 - \$15,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Real Estate Secs. Fd. Class A [MF]		\$15,001 - \$50,000	Tax-Deferred	Not Applicable	<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Franklin Rising Dividends Fd. Class A [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones SEP IRA ⇒ Templeton Growth Fund Cl A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fifth Third Bank - checking [BA]	JT	None	None		<input type="checkbox"/>
Franklin Rising Dividend Fund Class A [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: UTMA for Ava Messer held at Edward Jones.					
Franklin Rising Dividend Fund Class A [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: UTMA for Emma Messer held at Edward Jones					
Franklin Rising Dividend Fund Class A [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: UTMA for Hudson Messer held at Edward Jones					
IRA ⇒ Delaware Emerging Markets [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Dfa Glbl Real Estate Secs Fds [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ GS FINL Square Govt. Fd Instl [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Harbor Cap Apprec Retirement [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Hotchkis & Wiley High-Yield [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Invesco Small Cap Equity Cl R6 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IShares Core US Aggregate Bond [EF]					
IRA ⇒ IShares MSCI EAFE ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ J Hancock Classic Value CI R6 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Janus Henderson Flexible BD 1 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ MFS International Equity [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Oakmark International CL I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ PIMCO Commodities Plus Str I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Principal Midcap Fund CI Instl [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ T Rowe Price Equity Inc CL I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Vangrd FTSE All-Wrld exUS ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Vanguard Growth ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Vanguard Small Cap Value ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Vanguard Ttl BD Market ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Vanguard Value ETF [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA ⇒ Victory/Munder Mid Cap Core [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Jennifer C. Messer, PC, 100% Interest [OL]	SP	\$100,001 - \$250,000	Per Contract	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Greensburg, IN, US DESCRIPTION: Per instructions from Ethics this is the listing of Jennifer's law firm.					
Mainsource Bank - Checking [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Mainsource Bank - Savings [BA]	JT	None	Interest	\$1 - \$200	<input type="checkbox"/>
Personal Account - Citibank [BA]	SP	\$15,001 - \$50,000	None		<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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
2022 Enrollment Portfolio Class A [5P]	SP	02/28/2017	P	\$1,001 - \$15,000	
LOCATION: IN					
2025 Enrollment Portfolio Class A [5P]	SP	02/28/2017	P	\$1,001 - \$15,000	
LOCATION: IN					
College Choice 529 Plan ⇒ Adv 529 Int. Equity Index Fd A [5P]		02/28/2017	P	\$1,001 - \$15,000	
LOCATION: IN					
College Choice 529 Plan ⇒ Adv 529 Large Cap Index A [5P]		02/28/2017	P	\$1,001 - \$15,000	
LOCATION: IN					
College Choice 529 Plan ⇒ Diamond Hill Sm-Mid 529A [5P]		02/28/2017	P	\$1,001 - \$15,000	
LOCATION: IN					
IRA ⇒ AMCAP Fund Cl A [MF]	SP	09/19/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ American Mutual Fund CL A [MF]	SP	09/19/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA ⇒ Capital World Grw & Inc Fund A [MF]	SP	09/19/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ Delaware Emerging Markets [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Dfa Glbl Real Estate Secs Fds [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Europacific Growth Fund Cl C [MF]	SP	09/19/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ Fundamental Investors Fund A [MF]	SP	09/19/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ Growth Fund of America Cl A [MF]	SP	09/19/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ GS FINL Square Govt. Fd Instl [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Harbor Cap Apprec Retirement [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Hotchkis & Wiley High-Yield [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Invesco Small Cap Equity Cl R6 [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Investment Company of America Fd A [MF]	SP	09/19/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ iShares Core US Aggregate Bond [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ iShares MSCI EAFE ETF [EF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ J Hancock Classic Value Cl R6 [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Janus Henderson Flexible BD 1 [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA ⇒ MFS International Equity [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ New World Fund Cl A [MF]	SP	09/19/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ Oakmark International CL I [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ PIMCO Commodities Plus Str I [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Principal Midcap Fund Cl Instl [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ SMALLCAP World Fund Cl C [MF]	SP	09/19/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ T Rowe Price Equity Inc CL I [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Templeton World Fund Cl A [MF]	SP	09/19/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA ⇒ Vangrd FTSE All-Wrld exUS ETF [EF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Vanguard Growth ETF [EF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Vanguard Small Cap Value ETF [EF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Vanguard Ttl BD Market ETF [EF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Vanguard Value ETF [EF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒ Victory/Munder Mid Cap Core [MF]	SP	09/20/2018	P	\$1,001 - \$15,000	
IRA ⇒	SP	09/19/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Washington Mutual Invs Fd Cl A [MF]					

* 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 C: EARNED INCOME

Source	Type	Amount
Jennifer Messer, PC	Spouse salary and benefits	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Nelnet	May 1994	Student Loan	\$10,000 - \$15,000
JT	Mainsource Bank, Shelbyville, IN	Dec 2012	Mortgage on residence, McLean, VA	\$500,001 - \$1,000,000
JT	Mainsource Bank, Shelbyville, IN	Dec. 2011	Mortgage on residence, Dandridge, TN	\$15,001 - \$50,000
	Fifth Third Bank	2003	Mortgage on residence, Greensburg, IN.	\$15,001 - \$50,000

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)
- Edward Jones SEP IRA
- IRA (Owner: SP)

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. Luke Messer , 04/9/2019