

AUG 03 2021

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UNITED STATES HOUSE OF REPRESENTATIVES**2020 FINANCIAL DISCLOSURE STATEMENT**Form A
For Use by Members, Officers, and EmployeesLEGISLATIVE RESOURCE CENTER
2021 AUG 10 AH 10:14
(Office Use Only)
Name: George T. (Mike) Kelly Jr. **Daytime Telephone:** (202) 225-5746

A \$250 penalty shall be assessed against any individual who files more than 30 days late.

FILER STATUS	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: PA	Officer or Employee	Staff/Fleet Type: (If Applicable)
REPORT TYPE	<input checked="" type="checkbox"/> 2020 Annual (Due: May 17, 2021)	<input type="checkbox"/> Amendment	<input type="checkbox"/> Terminal	<input type="checkbox"/> Principal Assistant
			Date of Termination:	

PRELIMINARY INFORMATION – ANSWER EACH OF THESE QUESTIONS

- A. Did you, your spouse, or your dependent child:
- Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? Yes No
 - Receive more than \$200 in unearned income from any reportable asset during the reporting period?
- B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period?
- C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?
- D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?
- E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?

 Yes No

 Yes No
IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION – ANSWER EACH OF THESE QUESTIONS

IPO – Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance.

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 that benefits you, your spouse, or dependent child?

EXEMPTION – Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.

 Yes No

 Yes No

 Yes No

SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: George J. (Mike) Kelly Jr. Page 3 of 8

BLOCK A												BLOCK B												BLOCK C												BLOCK D																																			
Assets and/or Income Sources												Value of Asset												Type of Income												Amount of Income																																			
(a) cash, marketable securities, stocks, bonds, mutual funds, and other investment assets held for investment or production or income and with a fair market value exceeding \$1,000 at the end of the reporting period, unless (b) any other reportable asset or source of income that generated more than \$200 in "unearned" income during the year.												(do not use only letter symmetry)																								Transaction																																			
For all IRAs and other retirement plans (such as 401(k) plans) provide the value of each asset held in the account that exceeds the reporting threshold.												Indicate value of asset at close of the reporting period. If you use a valuation method other than fair market value, please specify the method.												Check all columns that apply. For accounts that generate non-deferred income (such as 401(k), IRA, or 403(b) accounts), you may check the "Tax-Deferred" category of income by checking the appropriate box below.												For assets for which you checked "Tax-Deferred" in Block C, you may check the "None" column. For other assets indicate the amount of non-deferred income by checking the appropriate box below.																																			
For cash and other cash accounts, total the amount in all financial accounts. If the total is over \$20,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts.												\$1,000 in interest-bearing accounts.												If an asset was sold during the reporting period and is included only because it generated income, the value should be "None".												Check "None" if no assets held by your spouse or dependent child in which you have no interest.																																			
For rental and other real property held for investment, provide a complete address or description, e.g., "Residential property," "whole city and state."																																																																							
For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of the activities, and its geographic location in Block A.																																																																							
Business: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); and any financial interest in, or income derived from, a Federal retirement program, including the Thrift Savings Plan.																																																																							
If you report a privately-held land that is an Exempted Investment Fund, please check the "ELF" box.																																																																							
If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DCH) or jointly held with anyone (JTH).																																																																							
For a detailed discussion of Schedule A requirements, please refer to the instruction booklet.																																																																							
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SCHEDULE A - ASSETS AND "UNEARNED" INCOME

Name: George J. (Mike) Kelly

SP. DC. JT.	BLOCK A Asset and/or Income Source		BLOCK B Year-End Value of Asset		BLOCK C Type of Income		BLOCK D Amount of Income		BLOCK E Transaction	
	A	B	C	D	E	F	G	H	I	J
SP	Kelly Automotive - Automotive Dealership, Butler, PA									
SP	Note Receivable - Claddagh Properties LP - real estate - Pittsburgh Road, Butler County, PA									
SP	Note Receivable - Kelly Automotive, Butler, PA									
SP	Land 12.67 acres, Route 8, Butler County, PA									
JT	PNC Bank Accounts									
SP	Pata FCU bank account	X	X	X	X	X	X	X	X	
SP	PC Exploration LTD Pfr 2008, Warrendale, PA	X	X	X	X	X	X	X	X	
SP	PC Exploration LTD Pfr 2008, Warrendale, PA	X	X	X	X	X	X	X	X	
SP	PC Exploration LTD Pfr 2009, Warrendale, PA	X	X	X	X	X	X	X	X	
SP	NTS 2013 Erwin LP, Indiana, PA, Oil & Gas	X	X	X	X	X	X	X	X	
SP	401(k) Investments as follows:									
SP	Pubcon Retirement Advantage Trust Maturity I (Formerly 2020)	X	X	X	X	X	X	X	X	
SP	IRA as follows:									
SP	PowerShares Tech Thrashed FD TSEI	X	X	X	X	X	X	X	X	
SP	Vanguard Bd Index Fd Inc	X	X	X	X	X	X	X	X	
SP	IRA - Atlanta Annuity and Life (variable annuity) - S&P500 @ Annual PTP Cap Ability	X	X	X	X	X	X	X	X	
SP	General Motors Stock									
SP	401(k) Profit sharing plan									
SP	Pubcon Retirement Advantage Trust Maturity I (Formerly 2020)	X	X	X	X	X	X	X	X	
SP	ACMS									
SP	PNC Money Market Fund #405	X	X	X	X	X	X	X	X	
SP	Austin, TX Elec Util Sys Rev									
SP	Boston MA Series B GO Coll 2/1/23	X	X	X	X	X	X	X	X	
SP	Broward City Fl Port Facs Rev Bond 5% due 9/1/24	X	X	X	X	X	X	X	X	
SP	California St GO Coll 1/2/27	X	X	X	X	X	X	X	X	
SP	Chicago IL O'Hare International Bond - 5% due 1/3/21	X	X	X	X	X	X	X	X	
SP	Connecticut St Ser A Go	X	X	X	X	X	X	X	X	
SP	Connecticut State Health & Educ Bond - 5% due 7/1/24	X	X	X	X	X	X	X	X	
SP	Denver City & City CO Airport Sys Ser A Rec - 5% due 1/15/23	X	X	X	X	X	X	X	X	
SP	Florida St Bd of Educ Public E Capital	X	X	X	X	X	X	X	X	
SP	Georgia St Ser C Go Bonds - 5% due 10/1/21	X	X	X	X	X	X	X	X	
SP	Indiana St Fin Auth Revenue Ser B	X	X	X	X	X	X	X	X	
SP	Illinois St Fin Auth Revenue	X	X	X	X	X	X	X	X	
SP	Illinois State Toll Highway Auth	X	X	X	X	X	X	X	X	
SP	Illinois State Ser A - 5% due 7/1/25	X	X	X	X	X	X	X	X	
SP	Louisian Cray VA Ser A Bonds - 5% due 12/1/21	X	X	X	X	X	X	X	X	
SP	North Carolina St Ser A GO - 5% due 6/1/22	X	X	X	X	X	X	X	X	

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SCHEDULE B – TRANSACTIONS

Name: GEORGE T. (LUKE) KELLY Room 5 or 8

Use additional sheets if more space is required.

SCHEDULE B - TRANSACTIONS

Name: George J. (Mike) Kelly

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Asset	Type of Transaction							Date	Amount of Transaction							
	PURCHASE			SALE					EXCHANGE							
SP, DC, JT, SP																
SP Austin TX Elect Utility Sys Rev	X							10/28/2020								
SP Chicago O'Hare International		X						1/1/2020								
SP New York City NY Muni Wtr Fina 21	X							1/6/2020								
SP North Carolina St Turnpike Aut B	X							10/16/2020								
SP Cleveland Cliffs Inc	X							4/28/2020								
SP Eastern Vance Global Macro Absolut	X							8/25/2020								
SP Georgia St Ser C GO	X							10/22/2020								
SP Goldman Sachs Absolute Return TR	X							8/25/2020								
SP Illinois Startle Sea A GO	X							5/26/2020								
SP Pennsylvania St Ibt Serre GO	X							10/21/2020								
SP Vivendi Merger Arbitrage-1	X							8/25/2020								
SP SPDR Gold Trust ETF	X							8/6/2020								
SP California St Gov Call 11/12/27	X							5/1/2020								
SP California St Gov Call 11/12/27	X							12/1/2020								
SP Artisan International FD-ADV	X							8/25/2020								
SP Brandywine Global Alternative Credit Fund Class I	X							4/28/2020								
SP T Rowe Price Growth Stock	X							8/6/2020								
SP Vanguard Mid-Cap Growth ETF	X							8/6/2020								
SP Vanguard Small Cap Growth	X							8/6/2020								
SP Vanguard Growth ETF	X							8/6/2020								
SP Vanguard Growth ETF	X							8/25/2020								

SCHEDULE C – EARNED INCOME

Name: George T (Mike) Key Jr

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List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. government) totaling \$200 or more during the reporting period. For a spouse, list only the source for other spouse earned income exceeding \$1,000. See examples below.

EXCLUDE: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

INCOME LIMITS and PROHIBITED INCOME: The 2020 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$23,336. The 2021 limit is \$23,950. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited.

INCOME: LIMITS AND PROHIBITED INCOME: The 2020 limit on outside earned income for members and employees compensated at or above the senior step rate was \$60,000. The 2021 limit is \$24,350. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited.

Source (Include date of receipt for honoraria)	Type	Amount
Kenosha Schools	Admitted Teaching Fac.	\$1600
State of Wisconsin	Institutional Board	\$1000
Other State Board of Education	School Board	\$1000
Kenosha Community College, Inc. Butter, Dr.	Salary	\$14,845
Kenosha Community College, Inc. Butter, Dr.	Salary	\$14,845

Use additional sheets if more space is required.

SCHEDULE D - LIABILITIES

Name: George J. (Kike) Kelly Page 3 of 8

Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. **Members:** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. **Report a revolving charge account** (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. **Column K** is for liabilities held solely by your spouse or dependent child.

SCHEDULE E – POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude:

Position	Name of Organization
<u>PRESIDENT</u>	<u>KELLY CHEVROLET-CARQUEST, INC.</u>
<u>PAST PRES.</u>	<u>MIKE KELLY BY KUNKEL, INC.</u>
<u>PRES. WEST</u>	<u>MIKE KELLY AUTOMOTIVE</u>
<u>PAST MEMBER CHARTERED</u>	<u>THE KERSON MUSEUM</u>
<u>PAST MEMBER EXECUTIVE</u>	<u>THE KUNKEL MUSEUM</u>

Use additional sheets if more space is required.