



Filing ID #10042365

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Jeff Fortenberry
Status: Member
State/District: NE01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2020
Filing Date: 08/11/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
C. Gregory Write, Inc., 100% Interest [OL]	SP	\$1,001 - \$15,000	S-Corp	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Lincoln/Lancaster, NE, US					
DESCRIPTION: Writing, editing and research business founded in 2014					
Gloria Deo, Inc., 50% Interest [OL]	JT	\$100,001 - \$250,000	S-Corp Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Lincoln/Lancaster, NE, US					
DESCRIPTION: Retail Book and Gift Stores					
COMMENTS: Valuation based on accounting estimates of inventory and income.					
Mainstar Trust FBO Jeffrey Fortenberry IRA ⇒ Practice Management of America, Inc [PS]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: Purchase of stock through a private placement memorandum in a self directed IRA. The Cash account in the IRA was used to purchase an additional amount of the same stock previously part of the IRA.					
Pepex Biomedical, Inc. [PS]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Medical device research company.					
Piedmont Shopping Center, LLC ⇒ Piedmont Shopping Center [RP]	JT	\$1,000,001 - \$5,000,000	LLC Income	None	<input type="checkbox"/>
LOCATION: Lincoln, Lancaster, NE, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Share of ownership in multiple member LLC.					
Practice Management of America, Inc. [PS]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Purchase of stock through a private placement memorandum. Company is a management organization for physician groups, headquartered in Commack, New York.					
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement CREF Global Equities [MF]	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement, CREF Stock Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Union Bank Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<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

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
C. Gregory Write, Inc.	Spouse	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Cornhusker Bank, Lincoln, NE	December 2015	Guarantor of Real Estate Loan for Piedmont Shopping Center, LLC	\$1,000,001 - \$5,000,000
SP	Union Bank	July 2015	Commercial line of credit for Gloria Deo, Inc.	\$15,001 - \$50,000
JT	Cornhusker Bank, Lincoln, NE	March 2013	Home Mortgage	\$100,001 - \$250,000
JT	Cornhusker Bank, Lincoln, NE	June 2013	Home equity	\$50,001 - \$100,000
SP	Union Bank	July 2015	Construction/ remodel loan for Gloria Deo, Inc.	\$50,001 - \$100,000
JT	Cornhusker Bank	May 2019	Energy loan for added efficiency and	\$10,000 - \$15,000

Owner Creditor	Date Incurred	Type	Amount of Liability
		heating	

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Piedmont Shopping Center, LLC

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

- Mainstar Trust FBO Jeffrey Fortenberry IRA
DESCRIPTION: Stock held in self-directed IRA account
- Piedmont Shopping Center, LLC (Owner: JT)
LOCATION: Lincoln/Lancasater, NE, US
- TIAA CREF Retirement Mutual Funds (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. Jeff Fortenberry , 08/11/2021