



Filing ID #10063293

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Michael C. Burgess  
**Status:** Former Member  
**State/District:** TX26

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2025  
**Filing Date:** 02/2/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Airlines Group, Inc. (AAL) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Bath & Body Works, Inc. (BBWI) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Brighthouse Financial, Inc. (BHF) [ST]	SP	\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
E Trade (Formerly Capital One Investing Cash Balance) [BA]	SP	\$1 - \$1,000	Interest	None	<input type="checkbox"/>
Fidelity Capital Appreciation [MF]	JT	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Cash Reserves [BA]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Contrafund [MF]	JT	\$100,001 - \$250,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
iShares MSCI Austria Capped Investable Market Index Fund (EWO) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
MetLife, Inc. (MET) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Mineral Rights [RP]		Undetermined	royalty income	None	<input type="checkbox"/>
LOCATION: multiple counties, TX, US DESCRIPTION: Dale Operating Gas Lease					
Mineral Rights [RP]		Undetermined	royalty income	None	<input type="checkbox"/>
LOCATION: multiple counties, TX, US DESCRIPTION: Titan Operating Gas Lease					
Mineral Rights [RP]	JT	Undetermined	royalty income	None	<input type="checkbox"/>
LOCATION: multiple counties, TX, US DESCRIPTION: Vantage Energy Operating Gas Lease.					
Non Investment Residence [RP]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: Fort Worth, TX, US					
Non Investment Residence [RP]	JT	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
LOCATION: Hot Springs, AR, US					
Northwest Mutual Life Insurance-65 Life 1987-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1988-whole [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1989-whole [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991b-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual Life Ins Co [WU]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Obsidian Energy Ltd. (OBE) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
OPKO Health Inc. (OPK) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Point Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: checking account					
Primary Residence [RP]	JT	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
LOCATION: Little Elm, TX, US					
Schwab Cash Account (Cultivar Joint 1753) [BA]	JT	\$1 - \$1,000	Interest	None	<input type="checkbox"/>
Schwab Cash Account (Cultivar Joint 3289) [BA]	JT	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
Schwab f/k/a TD Ameritrade Insured Deposit [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Money Market					
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Champlain Small Company Fund Institutional Shares (CIPNX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ EA Series Trust Alpha Architect Tail Risk ETF (CAOS) [EF]	JT	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ ETF Opportunities Trust Cultivar ETF (CVAR) [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ First Eagle Overseas Fund Class I (SGOIX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Gateway Fund Class Y (GTEYX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Hussman Strategic Growth Fd (HSGFX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iPath Bloomberg Commodity Index Total Return ETN (DJP) [ET]	JT	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	JT	None	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares Global Timber & Forestry ETF (WOOD) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Loomis Sayles Funds - Bond Fund Institutional Class (LSBDX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Loomis Sayles Funds - Global Bond Fund Instl Class (LGBX) [MF]	JT	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Loomis Sayles Strategic Alpha Fund Class Y (LASYX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) [BA]	JT	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]	JT	None	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Thompson Bond Fund (THOPX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ VanEck Gold Miners ETF (GDX) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ VanEck Natural Resources ETF (HAP) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Wasatch-Hoisington U.S. Treasury Fund (WHOSX) [MF]	JT	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 3289) [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Schwab Value Advantage Money Market (SNAXX) (Cultivar Joint 3289) [BA]	JT	\$500,001 - \$1,000,000	Interest	\$15,001 - \$50,000	<input type="checkbox"/>
Southwest Airlines Company (LUV) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Advance Auto Parts Inc. (AAP) [ST]					
Spouse's Wells Fargo IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	None		Tax-Deferred	<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Allspring Government Money Market Class I (GVIXX) [MF]	SP	\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]	SP	None		Tax-Deferred	<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Best Buy Co., Inc. Common Stock (BBY) [ST]	SP	None		Tax-Deferred	<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Blackstone Inc. Common Stock (BX) [ST]	SP	None		Tax-Deferred	<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Chemours Company (CC) [ST]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Fidelity Adv. Series - Equity Growth Fund [MF]	SP	\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ GRAIL, Inc. - Common Stock (GRAL) [ST]	SP	\$1 - \$1,000		Tax-Deferred	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST]	SP	None		Tax-Deferred	<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Pfizer, Inc. (PFE) [ST]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Royal Bank Of Canada Common Stock (RY) [ST]	SP	None		Tax-Deferred	<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]	SP	None		Tax-Deferred	<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ United States Treasury Bill [GS]	SP	None		None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Spouse's Wells Fargo IRA ⇒ Valero Energy Corporation Common Stock (VLO) [ST]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Viatris Inc. (VTRS) [ST]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Toyota Motor Corporation (TM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Undeveloped Property [RP]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
LOCATION: Hot Springs Village, AR, US					
Victorias Secret & Co. (VSCO) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Wells Fargo Bank Deposit Sweep Combined [BA]	JT	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Wells Fargo IRA ⇒ AbbVie Inc. (ABBV) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Advance Auto Parts Inc. (AAP) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ American Funds Growth Fund of America [BA]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Blackstone Inc. Common Stock (BX) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Chemours Company (CC) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Cigna Corporation (CI) [ST]		None	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ford Motor Company (F) [ST]					
Wells Fargo IRA ⇒ GE HealthCare Technologies Inc. - Common Stock (GEHC) [ST]		None		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: partial share spin off from General Electric (GE)					
Wells Fargo IRA ⇒ General Electric Company (GE) [ST]		None		Tax-Deferred	<input type="checkbox"/>
Wells Fargo IRA ⇒ GRAIL, Inc. - Common Stock (GRAL) [ST]		\$1 - \$1,000		Tax-Deferred	<input type="checkbox"/>
Wells Fargo IRA ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Wells Fargo IRA ⇒ International Business Machines Corporation (IBM) [ST]		None		Tax-Deferred	<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ iShares TIPS Bond ETF [EF]		None		Tax-Deferred	<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Kyndryl Holdings, Inc. (KD) [ST]		None		None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		None		Tax-Deferred	<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Microsoft Corporation (MSFT) [ST]		None		Tax-Deferred	<input type="checkbox"/>
Wells Fargo IRA ⇒ Nokia Corporation Sponsored American Depository Shares (NOK) [ST]		\$1 - \$1,000		Tax-Deferred	<input type="checkbox"/>
Wells Fargo IRA ⇒ Obsidian Energy Ltd. (OBE) [ST]		\$1 - \$1,000		Tax-Deferred	<input type="checkbox"/>
Wells Fargo IRA ⇒ Organon & Co. (OGN) [ST]		None		None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST]		None		Tax-Deferred	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo IRA ⇒ Phillips 66 Common Stock (PSX) [ST]		None		Tax-Deferred	<input type="checkbox"/>
Wells Fargo IRA ⇒ Southwest Airlines Company (LUV) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Wells Fargo IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Wells Fargo IRA ⇒ Valero Energy Corporation Common Stock (VLO) [ST]		None		Tax-Deferred	<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Walgreens Boots Alliance, Inc. - Common Stock (WBA) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]		\$1 - \$1,000		None	<input type="checkbox"/>
DESCRIPTION: 4/11/2022. Spin off from AT&T asset					
Wright Patterson Congressional Credit Union [BA]		\$1,001 - \$15,000		None	<input type="checkbox"/>

\* Investment vehicle 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?
AbbVie Inc. Common Stock (ABBV) [ST]		04/10/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Advanced Micro Devices, Inc. (AMD) [ST]	SP	01/2/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Amgen Inc. (AMGN) [ST]	SP	01/2/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Best Buy Co., Inc. Common Stock (BBY) [ST]		02/23/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Best Buy Co., Inc. Common Stock (BBY) [ST]	SP	02/26/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Blackstone Inc. (BX) [ST]	SP	01/2/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Blackstone Inc. (BX) [ST]		01/12/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Exxon Mobil Corporation (XOM) [ST]	SP	01/2/2024	P	\$15,001 - \$50,000	
Exxon Mobil Corporation Common Stock (XOM) [ST]	SP	03/11/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Contra Fund (FCNTX) [MF]		04/8/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Illumina, Inc. (ILMN) [ST]	SP	01/2/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Illumina, Inc. (ILMN) [ST]	SP	01/2/2024	P	\$15,001 - \$50,000	
Illumina, Inc. (ILMN) [ST]		01/2/2024	P	\$1,001 - \$15,000	
Illumina, Inc. - Common Stock (ILMN) [ST]		02/9/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Illumina, Inc. - Common Stock (ILMN) [ST]		02/12/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: The terms of the call are a strike price of \$138, and an expiration of 03/08/2024.					
Illumina, Inc. - Common Stock (ILMN) [ST]		02/12/2024	P	\$15,001 - \$50,000	
Illumina, Inc. - Common Stock (ILMN) [ST]	SP	02/12/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Illumina, Inc. - Common Stock (ILMN) [ST]		03/11/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Illumina, Inc. - Common Stock (ILMN) [ST]	SP	03/11/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Illumina, Inc. - Common Stock (ILMN) [ST]	SP	09/3/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Illumina, Inc. - Common Stock (ILMN) [ST]		08/30/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: sale of 200 shares					
International Business Machines Corporation Common Stock (IBM) [ST]		04/10/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares International Inflation-Linked Bond ETF (ITIP) [ST]		04/10/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Merck & Company, Inc. Common Stock (MRK) [ST]		04/10/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Palo Alto Networks, Inc. (PANW) [ST]	SP	01/2/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Palo Alto Networks, Inc. (PANW) [ST]		02/9/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Royal Bank Of Canada (RY) [ST]	SP	01/10/2024	P	\$1,001 - \$15,000	
Royal Bank Of Canada (RY) [ST]	SP	01/10/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Royal Bank Of Canada Common Stock (RY) [ST]	SP	07/16/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Royal Bank Of Canada Common Stock (RY) [ST]		07/16/2024	P	\$1,001 - \$15,000	
Royal Bank Of Canada Common Stock (RY) [ST]	SP	07/25/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	JT	12/31/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]	JT	09/9/2024	P	\$1,001 - \$15,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]	JT	08/27/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Wasatch-Hoisington U.S. Treasury Fund (WHOSX) [MF]	JT	12/31/2024	P	\$15,001 - \$50,000	
Spouse's Wells Fargo IRA ⇒ Allspring Government Money Market Class I (GVIXX) [MF]	SP	05/14/2024	P	\$50,001 - \$100,000	
Spouse's Wells Fargo IRA ⇒ United States Treasury Bill [GS]	SP	05/14/2024	P	\$50,001 - \$100,000	
Spouse's Wells Fargo IRA ⇒ United States Treasury Bill [GS]	SP	08/15/2024	S	\$50,001 - \$100,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
United Parcel Service, Inc. Common Stock (UPS) [ST]	SP	07/22/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Valero Energy Corporation (VLO) [ST]	SP	01/2/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Valero Energy Corporation (VLO) [ST]		01/12/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Walgreens Boots Alliance, Inc. - Common Stock (WBA) [ST]		03/1/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo IRA ⇒ Walgreens Boots Alliance, Inc. - Common Stock (WBA) [ST]		01/18/2024	P	\$15,001 - \$50,000	

\* Investment vehicle 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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Pennymac Loan Services LLC	06/17/2019	mortgage on Hot Springs, AR	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Member of the Board	University of North Texas Foundation

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2010	Self / World Net Daily	Publishing Contract

## 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 INVESTMENT VEHICLE DETAILS**

- Schwab Premier Bank (Cultivar Joint 1753) (Owner: JT)
- Spouse's Wells Fargo IRA (Owner: SP)
- Wells Fargo IRA

## **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. Michael C. Burgess , 02/2/2025