



Filing ID #10036772

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Peter J. Visclosky
Status: Member
State/District: IN01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Department of Labor Credit Union - Reward Checking [BA]	SP	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Dodge & Cox Stock Fund [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Federated Investors GV ULTRSH DUR SV [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
IRA Rollover Vanguard Morgan Growth Fund [MF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
IRA Rollover Vanguard Selected Value Fund [MF]	SP	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
IRA Rollover Vanguard Strategic Equity Fund [MF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
IRA Rollover Vanguard Wellington Fund [MF]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
IRA Rollver Vanguard 500 Index Fund [MF]	SP	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA Touchstone Sustainability [MF]	SP	None	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Mutual Quest Fund [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Northwest Indiana Bancorp (NWIN) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
People's Bank Checking Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
People's Bank Money Market [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
People's Bank Money Market [MF]	SP	\$1 - \$1,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
People's Bank Senior Plus Checking [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Pepsico, Inc. (PEP) [ST]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ American Electric Power Company, Inc. (AEP) [ST]		None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Anthem, Inc. (ANTM) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ AT&T Inc. (T) [ST]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Comcast Corporation - Class A (CMCSA) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ DFA INVT Dimensions Group IN 1YR FXD [MF]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Duke Energy Corporation (DUK) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Enbridge Inc (ENB) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Peter J. Visclosky Revocable Living Trust ⇒ Exxon Mobil Corporation (XOM) [ST]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Federated Investors GV ULTRSH DUR SV [MF]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ People's Bank Money Market [BA]		\$1 - \$1,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Verizon Communications Inc. (VZ) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Vodafone Group Plc Ordinary Shares (VODPD) [ST]		None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Roth IRA Touchstone Sustainability [MF]	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Roth IRA Vanguard International Value Fund [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard Tax-Managed [MF]	SP	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Total International Stock Index [MF]	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<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?
Federated Investors GV ULTRSH DUR SV [MF]	SP	12/18/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Federated Investors GV ULTRSH DUR SV [MF]	SP	12/20/2019	P	\$1,001 - \$15,000	
IRA Touchstone Sustainability [MF]	SP	12/18/2019	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
People's Bank Money Market [MF]	SP	12/18/2019	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
People's Bank Money Market [MF]	SP	12/18/2019	P	\$15,001 - \$50,000	
Peter J. Visclosky Revocable Living Trust ⇒ American Electric Power Company, Inc. (AEP) [ST]		01/14/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Anthem, Inc. (ANTM) [ST]		01/14/2019	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ AT&T Inc. (T) [ST]		01/14/2019	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Enbridge Inc. [BA]		01/14/2019	P	\$1,001 - \$15,000	
Peter J. Visclosky Revocable Living Trust ⇒ Exxon Mobil Corporation (XOM) [ST]		01/14/2019	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Federal Home Loan Bank [BA]		03/6/2019	P	\$1,001 - \$15,000	
Peter J. Visclosky Revocable Living Trust ⇒ Federal Home Loan Bank 3.00% [BA]		06/7/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Federated Investors GV ULTRSH DUR SV [BA]		03/13/2019	P	\$50,001 - \$100,000	
Peter J. Visclosky Revocable Living Trust ⇒ Federated Investors GV ULTRSH DUR SV [BA]		03/20/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Federated Investors GV ULTRSH DUR SV [BA]		03/20/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Federated Investors GV ULTRSH DUR SV [BA]		05/15/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Federated Investors GV ULTRSH DUR SV [BA]		12/18/2019	S	\$15,001 - \$50,000	<input type="checkbox"/>
Peter J. Visclosky Revocable Living Trust ⇒ Federated Investors GV ULTRSH DUR SV [BA]		03/13/2019	P	\$15,001 - \$50,000	
Peter J. Visclosky Revocable Living Trust ⇒ Federated Investors GV ULTRSH DUR SV [BA]		03/13/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Peter J. Visclosky Revocable Living Trust ⇒ Federated Investors GV ULTRSH DUR SV [BA]		03/13/2019	P	\$15,001 - \$50,000	
Peter J. Visclosky Revocable Living Trust ⇒ Vodafone Group Plc Ordinary Shares (VODPD) [ST]		01/14/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Roth IRA Touchstone Sustainability [MF]	SP	12/18/2019	S (partial)	\$15,001 - \$50,000	<input checked="" 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 C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	People's Bank	January 2017	Mortgage	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	The Visclosky Foundation

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

- Peter J. Visclosky Revocable Living Trust

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. Peter J. Visclosky , 08/13/2020