



Filing ID #10038631

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. William Hurd  
**Status:** Member  
**State/District:** TX23

## FILING INFORMATION

**Filing Type:** Amendment 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?
Mutual Funds ⇒ Alliance Bernstein [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ American Century Investments EMRG MKTS I [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mutual Funds ⇒ Carillon Family of Funds Eagle MID Cap Growth I [MF]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Credit Susie Floating Rate High Income I [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Devenir [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Mutual Funds ⇒ Dimensional Fund Advisors Intl Core Eqty Inst [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ iShares Trust Core S&P500 [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Mutual Funds ⇒ iShares Trust MSCI [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Legs Mason Funds Western Asset Core [MF]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Mutual Funds ⇒ MFS Funds Value I [MF]		None	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Pimco Investments Income Inst [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Pimco Investments Intl Bonds [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Primecap Odyssey Funds [MF]		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Sale of Primecap Odyssey Funds Mutual Fund.					
Mutual Funds ⇒ Principal Funds Global Real Estate [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Vanguard Growth Index Admiral [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mutual Funds ⇒ Vanguard Mid Cap ETF [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mutual Funds ⇒ Vanguard Small CP ETF [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mutual Funds ⇒ Vanguard Value Index Admiral [MF]		\$15,001 - \$50,000	Dividends	\$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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Mutual Funds ⇒ American Funds Fundamental [MF]		01/31/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Mutual Funds ⇒ DFA International Core Equ [MF]		01/31/2019	P	\$1,001 - \$15,000	
Mutual Funds ⇒ Leg Mason Funds Western Asset Core [MF]		01/31/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Mutual Funds ⇒ MFS Funds Value I [MF]		09/27/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Mutual Funds ⇒ MFS Value I [MF]		01/31/2019	P	\$1,001 - \$15,000	
Mutual Funds ⇒ Primecap Odyssey Funds [MF]		09/27/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Mutual Funds ⇒ Primecap Odyssey GR FD [MF]		01/31/2019	P	\$1,001 - \$15,000	
Mutual Funds ⇒ Vanguard Growth INDEX [MF]		09/27/2019	P	\$15,001 - \$50,000	
Mutual Funds ⇒ Vanguard Value Index Admiral [MF]		09/27/2019	P	\$15,001 - \$50,000	

\* 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
	Ocwen Financial Corporation	August 2009	Mortgage for my personal residence	\$100,001 - \$250,000
	USAA	Aug 2009	Home Loan	\$100,001 - \$250,000

### SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Real Time with Bill Maher	02/1/2019	02/2/2019	Washington, DC - Los Angeles - Washington, DC	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
American Enterprise Institute	03/8/2019	03/9/2019	Washington, DC - Sea Island, GA - Washington, DC	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aspen Institute	07/20/2019	07/21/2019	Washington, DC - Aspen, CO - Washington, DC	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aspen Cybersecurity Working Group	09/30/2019	10/1/2019	Washington, DC - White Plains, NY - Washington, DC	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

o Mutual Funds
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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. William Hurd , 08/13/2020