



Filing ID #10055403

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Randy K. Weber Sr.
Status: Member
State/District: TX14

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 08/5/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|----------------|----------------------|--------------------------|
| Employee Retirement System of Texas [DB] | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Kyle Weber Promissory Note [DO] | JT | \$15,001 - \$50,000 | Interest | \$201 - \$1,000 | <input type="checkbox"/> |
| National Benefit Advisors LLC, 75% Interest [OL] | SP | \$50,001 - \$100,000 | Distributions | \$50,001 - \$100,000 | <input type="checkbox"/> |
| LOCATION: Houston, TX, US DESCRIPTION: Insurance consulting | | | | | |
| R&B Weber Properties, LLC ⇒ 3221 Wheatridge [RP] | | \$100,001 - \$250,000 | Rent | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Pearland, TX, US | | | | | |
| R&B Weber Properties, LLC ⇒ 5377 Morgan Oak [RP] | | \$100,001 - \$250,000 | Rent | \$5,001 - \$15,000 | <input type="checkbox"/> |
| LOCATION: Alvin, TX, US | | | | | |
| Roth IRA ⇒ American New Perspective Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ American New Perspective Fund [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|--------------------|----------------|--------|--------------------------|
| Roth IRA ⇒ American Smallcap World Fund [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ American Smallcap World Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ Delaware Ivy Mid Cap Growth [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ Delaware Ivy Mid Cap Growth [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ Dodge & Cox Stock Fund [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ Dodge & Cox Stock Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ Edgewood Growth Fund [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ Edgewood Growth Fund [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ Pgim Short Term Corporate Bond [MF] DESCRIPTION: Value decrease. No reportable transactions. | SP | \$1 - \$1,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ Pgim Short Term Corporate Bond [MF] DESCRIPTION: Value decrease. No reportable transactions. | | \$1 - \$1,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ Pioneer Bond [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ Pioneer Bond [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ T Rowe Price Large Cap Growth [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Roth IRA ⇒ T Rowe Price Large Cap Growth [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|---------------------|----------------------|--------------------|--------------------------|
| Teachers Retirement System of Texas [DB] | SP | Undetermined | Pension distribution | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Wells Fargo Bank Accounts [BA] | JT | \$15,001 - \$50,000 | 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 |
|-------------------------------------|-------------------------------------|--------|
| Teachers Retirement System of Texas | Spouse Defined Benefit Distribution | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|--------------------------------|---------------|---|-----------------------|
| JT | Weber Irrevocable Living Trust | April 2012 | Mortgage on 5377 Morgan Oaks; Alvin, TX | \$50,001 - \$100,000 |
| JT | Caliber Mortgage Co | Oct 2020 | Condominium Mortgage | \$250,001 - \$500,000 |
| | Truist Bank | October 2021 | Mortgage on personal residence | \$250,001 - \$500,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|------------|-----------------------------|
| Proprietor | R & B Weber Properties, LLC |

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|--------------|-------------------------------|--|
| January 2009 | Myself and the State of Texas | Continued participation in a state pension plan under Employees Retirement System of Texas |

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

- R&B Weber Properties, LLC
LOCATION: US
- Roth IRA
- Roth IRA (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. Randy K. Weber Sr., 08/5/2023