



Filing ID #10056308

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Gregory Albritton  
**Status:** Congressional Candidate  
**State/District:** AL02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2023  
**Filing Date:** 02/6/2024  
**Period Covered:** 01/01/2023– 01/5/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of Evergreen Savings Account [BA]		\$50,001 - \$100,000	None		
Charles Schwab IRA ⇒ AbbVie Inc. Common Stock (ABBV) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab IRA ⇒ Chevron Corporation Common Stock (CVX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ CME Group Inc. - Class A Common Stock (CME) [ST]		\$1,001 - \$15,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Charles Schwab IRA ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ iShares U.S. Financial ETF (IYF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ KeyCorp Common Stock (KEY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ Nucor Corporation Common Stock (NUE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ Southern Company (SO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ Sweep Account [BA]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA ⇒ US Treasury Bill Due 12/12/2023 [GS]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Conecuh County Property [RP]		\$250,001 - \$500,000	None		
LOCATION: Conecuh County, AL, US					
Minette Property [RP]		\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Minette, AL, US					
Monroe County Forestry Property [RP]		\$100,001 - \$250,000	None		
LOCATION: Monroe County, AL, US					
Monroeville Property [RP]		\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Monroeville, AL, US					
Navy Federal Checking Account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Navy Federal Savings Account [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Regions Bank Checking Account [BA]	JT	\$15,001 - \$50,000	None		
Retirement Systems of Alabama ⇒ Retirement Systems of Alabama Deferred Compensation [IH]		\$100,001 - \$250,000	Tax-Deferred		
USAA IRA ⇒ Savings Account [BA]		\$15,001 - \$50,000	Tax-Deferred		

\* 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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Retirement Systems of Alabama	Spouse Salary	\$30,113.16	\$30,717.16
State of Alabama	Salary	\$54,654.88	\$38,956.08

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	American AgCredit	March 2020	Consolidated Real Property Loan	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Alabama State Senator	State Senator
Board Member	Southwest Mental Health Group

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
February 2016	Retirement Systems of Alabama, Filer	Deferred compensation plan - payable at future date.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- Charles Schwab IRA
- Retirement Systems of Alabama
- USAA IRA

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**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:** Gregory Albritton , 02/6/2024