



Filing ID #10042589

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Bruce Westerman  
**Status:** Member  
**State/District:** AR04

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 08/12/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Fisher IRA ⇒ Cash within IRA [BA]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Fisher IRA ⇒ Credit Suisse FI Large Cap Growth Enhanced ETN (FLGE) [EF]		None	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ Invesco Nasdaq Internet [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$100,001 - \$250,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ Invesco S&P 500 Top 50 ETF (XLG) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Europe Financials Sector Index Fund (EUFN) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Eurozone ETF (EZU) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Fisher IRA ⇒ iShares MSCI Global Select Metals & Mining Producers Fund (PICK) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Japan (EWJ) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares TR Global Energy ETF (IXC) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Fisher IRA ⇒ iShares TR Global Tech ETF (IXN) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares US Financials [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares US Medical Devices (IHI) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ Kraneshares China Internet [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ SPDR Cons Disc Select Sector (XLY) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ SPDR Healthcare Select Sector (XLV) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ SPDR Industrials Select Sector (XLI) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ UBS AG FI Enhanced Global High Yield ETN due March 3, 2026 (FIHD) [EF]		None	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		None	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ Vanguard FTSE European ETF (VGK) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES CORE MSCI EAFE ETF (IEFA) [EF]		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
Morgan Stanley ⇒		\$15,001 - \$50,000	Tax-Deferred	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
ISHARES CORE MSCI EMERGING (IEMG) [EF]				
Morgan Stanley ⇒ ISHARES CORE S&P US GROWTH (IUSG) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ ISHARES CORE S&P US VALUE (IUSV) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ ISHARES RUSSELL 2000 GRWTH ETF (IWO) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES RUSSELL 2000 VALUE ETF (IWN) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ ISHARES RUSSELL MIDCAP G ETF (IWP) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES RUSSELL MIDCAP V ETF (IWS) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Morgan Stanley Private Bank [OT]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Cash holding within IRA				
State of Arkansas Pension [PE]	SP	Undetermined	Tax-Deferred	<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?
Fisher IRA ⇒ Credit Suisse Large Cap Growth Enhanced [EF]		05/26/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fisher IRA ⇒ Invesco Nasdaq Internet [EF]		10/14/2020	P	\$1,001 - \$15,000	
Fisher IRA ⇒ Invesco QQQ Trust Series 1 [EF]		03/5/2020	P	\$1,001 - \$15,000	
Fisher IRA ⇒		04/7/2020	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Invesco QQQ Trust Series 1 [EF]					
Fisher IRA ⇒ Invesco QQQ Trust Series 1 [EF]		05/13/2020	P	\$1,001 - \$15,000	
Fisher IRA ⇒ Invesco S&P 500 Top 50 [EF]		05/26/2020	P	\$1,001 - \$15,000	
Fisher IRA ⇒ iShares Global Tech [EF]		05/26/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares Global Tech [EF]		10/14/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Europe Financials Sector Index Fund [EF]		04/7/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Japan [EF]		04/7/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares US Financials [EF]		05/26/2020	P	\$1,001 - \$15,000	
Fisher IRA ⇒ iShares US Medical Devices (IHI) [EF]		05/7/2020	P	\$1,001 - \$15,000	
Fisher IRA ⇒ Kraneshares China Internet [EF]		10/19/2020	P	\$1,001 - \$15,000	
Fisher IRA ⇒ SPDR Cons Disc Select Sector [EF]		05/7/2020	P	\$1,001 - \$15,000	
Fisher IRA ⇒ SPDR Healthcare Select Sector [EF]		04/7/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ SPDR Healthcare Select Sector [EF]		05/7/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ SPDR Industrial Select Sector [EF]		05/26/2020	P	\$1,001 - \$15,000	
Fisher IRA ⇒ UBS AG FI Enhanced Global High Yield [EF]		05/7/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fisher IRA ⇒ Vanguard FTSE Emerging Markets [EF]		10/14/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ IShares Core MSCI EAFE [EF]		09/2/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ IShares Core MSCI EAFE [EF]		02/28/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ IShares Core MSCI Emerging Markets [EF]		09/2/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ IShares Core S&P US Growth [EF]		09/2/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ IShares Core S&P US Value [EF]		09/2/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ iShares Russell 2000 Value [EF]		09/2/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ IShares Russell Midcap Value [EF]		09/2/2020	P	\$1,001 - \$15,000	

\* 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

Source	Type	Amount
Lakeside School District	Spouse Salary	N/A

#### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	US BANK	December 2014	Equity Line - Home	\$15,001 - \$50,000

#### SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Director	Arkansas Forestry Association
Director	Cooper-Anthony Child Advocacy Center

## SCHEDULE F: AGREEMENTS

<b>Date</b>	<b>Parties To</b>	<b>Terms of Agreement</b>
August 2011	Spouse and State of Arkansas	Spouse has an agreement with the State of Arkansas for a pension based on prior employment

## 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

- Fisher IRA
- Morgan Stanley

## 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. Bruce Westerman , 08/12/2021