



Filing ID #10038477

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Lucia Kay McBath
Status: Member
State/District: GA06

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?
1 Acre Lot [RP]	SP	\$50,001 - \$100,000	Capital Gains	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LOCATION: Rockford/Blount, TN, US					
AT&T Inc. (T) [ST]	SP	\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Cambiar Global Ultra Focus [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Deutsche X Trackers MSCO EAFE Hedged Equity FTF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Exxon Mobil Corporation (XOM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Contra Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Contra Fund Comingled Pool [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Extended Market Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity International Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Large Cap Growth [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Fidelity S&P 500 Index Fund [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Small Cap Discovery [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	<input type="checkbox"/>
Fidelity Small/Mid Cap Index Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Small/Mid Growth Index Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Total Market Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity US Bond Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares 7 - 10 Year Treasury Bond ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IShares Core US Aggregate Bond ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IShares MSCI EAFE Small Cap ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IShares Russell 2000 ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SPDR S&P 500 ETF [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
SPDR S&P Mid Cap 400 ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard FTSE Developed Markets ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Intermediate Term Corp Bond ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Walhausen Small Cap Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>

* 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?
1 Acre Lot [RP]	SP	07/1/2019	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LOCATION: Rockford/Blount, TN, US					

* 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
Delta Airlines	Spouse salary	\$87,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	American Express	12/18	revolving charge card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Founder	Champion In the Making Legacy Foundation
Founder	Jordan's Hope

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

Source	Description	Value
Estate of Samuel McBath (Rockford, TN, US)	Cash Inheritance	\$250,000.00

Source	Description	Value
COMMENTS: Inheritance belongs to spouse; from grandparents;		

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Education Foundation	08/4/2019	08/12/2019	Atlanta, GA - Tel Aviv, Israel - Jerusalem, Israel - Tiberias, Israel - Atlanta, GA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
First Coast Leadership Foundation	04/6/2019	04/6/2019	New York City, NY - Jacksonville, FL - Atlanta, GA	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
National Action Network	04/5/2019	04/6/2019	Washington, DC - New York City, NY - N/A	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

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. Lucia Kay McBath , 08/13/2020