



Filing ID #10042414

# 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:** 2020  
**Filing Date:** 08/13/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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"/>
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 Immediate Term Corp Bond ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Waltherhausen Small Cap Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?

\* 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
Delta Airlines	Spouse salary	\$70,000.00

## SCHEDULE D: LIABILITIES

None disclosed.

## 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

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

## 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 , 08/13/2021