



Filing ID #10062858

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Lloyd Doggett
Status: Member
State/District: TX37

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2023
Filing Date: 08/26/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
3800 Kennelwood [RP] LOCATION: Austin / Travis, TX, US		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
Akre Focus Fund [MF]		\$500,001 - \$1,000,000	Capital Gains	\$15,001 - \$50,000	<input type="checkbox"/>
Ally Bank CD [BA]		None	Interest	\$201 - \$1,000	<input type="checkbox"/>
American Century Ultra Fund [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Artisan High Income Fund - Institutional Shares (APHFX) [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Bank OZK [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Berkshire Hathaway Inc. New (BRK.B) [ST]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Brown Advisory - Beutel Goodman LCV Fd [MF]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brown Advisory Global Leaders Investor (BAFLX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Brown Advisory Sustainable Growth Instl [MF]		\$500,001 - \$1,000,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Brown Advisory Tax-Exempt Sustainable Bond Fund Investor Shares (BITEX) [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Calvert Small Cap Fund;I [MF]		\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Cambridge Savings CD [BA]		None	Interest	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab Bank CD [BA]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Coca-Cola Company (KO) [ST]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Cohen & Steers Pfd Secs @ Inc Cl I [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Congressional Federal Credit Union [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DL3 Holdings, LLC [RP] LOCATION: Austin, TX, US		None	None		<input type="checkbox"/>
Driehaus Micro Cap Growth [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Edgewood Growth Fund Institutional [MF]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
FIERA CAPITAL INTERNATIONAL EQUITY FUND Institutional [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
First Business Bank CD [BA]		None	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
First Horizon Bank CD [BA]		\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
FPA New Income [MF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Hartford Schroders International Stock Fund (SCIEX) [MF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Home and Rental Property #1 [RP]		\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Austin / Travis, TX, US					
Home Depot, Inc. (HD) [ST]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
International Business Machines Corporation (IBM) [ST]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Johnson & Johnson (JNJ) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Kyndryl Holdings, Inc. (KD) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Metropolitan West Unconstrained Bond Fund Class 1 [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Mineral Interest, McFarland Tract [RP]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: Ward Co., TX, US					
Mutual Shares Corporation Cl Z (MUTHX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Nuveen All American Municipal Bond Fund [MF]		\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Nuveen Intermediate Duration Municipal Bond Fund Class R (NUVBX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Oakmark International Fund Investor Class (OAKIX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
PIMCO Income Fund (PIMIX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
PPG Industries, Inc. (PPG) [ST]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Procter & Gamble Company (PG) [ST]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Prosperity Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Cash Account					
RBC Global Opportunities [MF]		None	None		<input checked="" type="checkbox"/>
Rental Property #2 [RP]		\$5,000,001 - \$25,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Austin / Travis, TX, US					
Schwab Government Money Fund [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Schwab International Index Fund - Select Shares (SWISX) [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Schwab Muni Money Fund [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Schwab Premier Bank [BA]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab Short-Term Bond Index Fund [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Schwab US Aggregate Bond Index Fund [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Schwab Value Advantage [MF]	SP	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Southstate Bank CD [BA]		None	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Spyglass Growth Fund;Institutional [MF]		None	None		<input checked="" type="checkbox"/>
TIAA-CREF Retirement - Stock Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TIAA-CREF Retirement Global Equities Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
TIAA-CREF Retirement- Real Estate Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Dividend Growth Fund [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Extended Mkt Index Admiral (VEXAX) [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Growth Index Fund Admiral [MF]		\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Intermediate-Term Investment Grade Fund Admiral Shrs (VFIDX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Long-Term Investment Grade Fund Admiral Shrs (VWETX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Mid-Cap Value Index Fd Admiral (VMVAX) [MF]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Municipal Money Market Fund (VMSXX) [MF]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard PRIMECAP Fund Admiral Shares (VPMAX) [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Vanguard Short Term Bond (VBIRX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Short Term Investment-Grade Admiral (VFSUX) [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Small-Cap Index Fund Inv [MF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard Specialized Portfolios Energy Fund (VGENX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard Total Bond Market Index Admiral (VBTLX)		\$250,001 -	Dividends	\$5,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
[MF]		\$500,000		\$15,000	<input type="checkbox"/>
Vanguard Total Int Stock Index Admiral [MF]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Total International Bond Index Admiral (VTABX) [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Total Stock Market [MF]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard U.S. Growth Fund Admiral [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard Whitehall Funds, Selected Value Fund (VASVX) [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Vanguard Windsor II Fund [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Voya Intermediate Bond Fund Class I (IICIX) [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
WisdomTree US Dividend Growth ETF (DGRW) [EF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<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?
American Century Ultra Investor Class (TWCUX) [MF]		12/19/2023	P	\$15,001 - \$50,000	
Artisan High Income Fund - Institutional Shares (APHFX) [MF]		09/1/2023	P	\$100,001 - \$250,000	
Coca-Cola Company (KO) [ST] DESCRIPTION: Reinvest Shares		04/4/2023	P	\$1,001 - \$15,000	
Coca-Cola Company (KO) [ST] DESCRIPTION: Reinvest shares		07/3/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Coca-Cola Company (KO) [ST] DESCRIPTION: Reinvest shares		10/2/2023	P	\$1,001 - \$15,000	
Coca-Cola Company (KO) [ST] DESCRIPTION: Reinvest Shares		12/15/2023	P	\$1,001 - \$15,000	
FPA New Income (FPNIX) [MF]		09/1/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
Hartford Schrodgers International Stock Fund (SCIEX) [MF]		09/1/2023	P	\$100,001 - \$250,000	
Hartford Schrodgers International Stock Fund (SCIEX) [MF]		12/6/2023	P	\$100,001 - \$250,000	
Home Depot, Inc. (HD) [ST] DESCRIPTION: Reinvest Shares		03/24/2023	P	\$1,001 - \$15,000	
Home Depot, Inc. (HD) [ST] DESCRIPTION: Reinvest Shares		06/16/2023	P	\$1,001 - \$15,000	
Home Depot, Inc. (HD) [ST] DESCRIPTION: Reinvest shares		09/14/2023	P	\$1,001 - \$15,000	
Home Depot, Inc. (HD) [ST] DESCRIPTION: Reinvest Shares		12/14/2023	P	\$1,001 - \$15,000	
International Business Machines Corporation (IBM) [ST] DESCRIPTION: Reinvest Shares		03/13/2023	P	\$1,001 - \$15,000	
International Business Machines Corporation (IBM) [ST] DESCRIPTION: Reinvest Shares		06/13/2023	P	\$1,001 - \$15,000	
International Business Machines Corporation (IBM) [ST] DESCRIPTION: Reinvest shares		09/11/2023	P	\$1,001 - \$15,000	
International Business Machines Corporation (IBM) [ST] DESCRIPTION: Reinvest Shares		12/11/2023	P	\$1,001 - \$15,000	
Johnson & Johnson (JNJ) [ST] DESCRIPTION: Reinvest Shares		03/8/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Johnson & Johnson (JNJ) [ST] DESCRIPTION: Reinvest Shares		06/7/2023	P	\$1,001 - \$15,000	
Johnson & Johnson (JNJ) [ST] DESCRIPTION: Reinvest shares		09/7/2023	P	\$1,001 - \$15,000	
Johnson & Johnson (JNJ) [ST] DESCRIPTION: Reinvest Shares		12/5/2023	P	\$1,001 - \$15,000	
Mutual Shares Corporation Cl Z (MUTHX) [MF]		12/20/2023	P	\$1,001 - \$15,000	
Oakmark International Fund Investor Class (OAKIX) [MF]		12/14/2023	P	\$1,001 - \$15,000	
PPG Industries, Inc. (PPG) [ST] DESCRIPTION: Reinvest Shares		03/13/2023	P	\$1,001 - \$15,000	
PPG Industries, Inc. (PPG) [ST] DESCRIPTION: Reinvest Shares		06/13/2023	P	\$1,001 - \$15,000	
PPG Industries, Inc. (PPG) [ST] DESCRIPTION: Reinvest shares		09/12/2023	P	\$1,001 - \$15,000	
PPG Industries, Inc. (PPG) [ST] DESCRIPTION: Reinvest Shares		12/12/2023	P	\$1,001 - \$15,000	
Procter & Gamble Company (PG) [ST] DESCRIPTION: Reinvest Shares		02/16/2023	P	\$1,001 - \$15,000	
Procter & Gamble Company (PG) [ST] DESCRIPTION: Reinvest Shares		05/16/2023	P	\$1,001 - \$15,000	
Procter & Gamble Company (PG) [ST] DESCRIPTION: Reinvest Shares		08/16/2023	P	\$1,001 - \$15,000	
Procter & Gamble Company (PG) [ST] DESCRIPTION: Reinvest Shares		11/15/2023	P	\$1,001 - \$15,000	
RBC Global Opportunities Fund - Class I (RGOIX) [MF]		12/6/2023	S	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>
Schwab International Index Fund - Select Shares (SWISX) [MF]		12/15/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Schwab Value Advantage Money Fund (SWVXX) [MF]		09/1/2023	P	\$15,001 - \$50,000	
Schwab Value Advantage Money Fund (SWVXX) [MF]		11/14/2023	P	\$1,001 - \$15,000	
Schwab Value Advantage Money Fund (SWVXX) [MF]		12/6/2023	P	\$15,001 - \$50,000	
Spyglass Growth Fund - Institutional Shares (SPYGX) [MF]		03/15/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
Vanguard U.S. Growth Fund Admiral Shares (VWUAX) [MF]		12/14/2023	P	\$1,001 - \$15,000	
Vanguard U.S. Growth Fund Admiral Shares (VWUAX) [MF]		12/18/2023	P	\$1,001 - \$15,000	
Vanguard Growth Index Fd Admiral Shs (VIGAX) [MF]		Quarterly	P	\$1,001 - \$15,000	
Vanguard Index Trust Total Stock Market Index Fund (VTSMX) [MF]		Quarterly	P	\$1,001 - \$15,000	
Vanguard Intermediate-Term Tax-Exempt Fd Admiral Shs (VWIUX) [MF]		Monthly	P	\$1,001 - \$15,000	
Vanguard Limited-Term Tax-Exempt Fd Admiral Shs (VMLUX) [MF]		Monthly	P	\$1,001 - \$15,000	
Vanguard Long-Term Investment Grade Fund Admiral Shrs (VWETX) [MF]		Monthly	P	\$1,001 - \$15,000	
Vanguard Mid-Cap Value Index Fd Admiral (VMVAX) [MF]		Quarterly	P	\$1,001 - \$15,000	
Vanguard PRIMECAP Fund Admiral Shares (VPMAX) [MF]		12/19/2023	P	\$50,001 - \$100,000	
Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF]		Quarterly	P	\$1,001 - \$15,000	
Vanguard Specialized Portfolios Energy Fund (VGENX) [MF]		12/27/2023	P	\$1,001 - \$15,000	
Vanguard Specialized Portfolios, Vanguard Dividend Growth Fund (VDIGX) [MF]		12/27/2023	P	\$1,001 - \$15,000	
Vanguard Total International Stock Index Fd Admiral (VTIAX) [MF]		Quarterly	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Whitehall Funds, Selected Value Fund (VASVX) [MF]		12/19/2023	P	\$15,001 - \$50,000	
Vanguard Windsor II Fund (VWNFX) [MF]		12/19/2023	P	\$15,001 - \$50,000	
Vanguard Windsor II Fund (VWNFX) [MF]		06/16/2023	P	\$1,001 - \$15,000	
Voya Intermediate Bond Fund Class I (IICIX) [MF]		09/1/2023	P	\$250,001 - \$500,000	
Voya Intermediate Bond Fund Class I (IICIX) [MF]		12/6/2023	P	\$50,001 - \$100,000	

* 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
Texas ERS/JRS	State Legislative/Judicial Annuity	\$69,995.00
Education Consultant	Spouse	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Prosperity Bank, Austin (formerly Liberty Bank, Austin)	August 2005	Letter of Credit on 6374 Spicewood Springs	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Aspen Institute, Inc. (Congressional Program)	08/7/2023	08/19/2023	Austin, TX - Nairobi, Kenya - Austin, TX	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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. Lloyd Doggett , 08/26/2024