



Filing ID #10048267

# 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:** 2021  
**Filing Date:** 05/16/2022

## 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 ⇒ Invesco Nasdaq Internet [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ Invesco S&P 500 Top 50 ETF (XLG) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Europe Financials Sector Index Fund (EUFN) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Eurozone ETF (EZU) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Global Select Metals & Mining Producers Fund (PICK) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fisher IRA ⇒ iShares MSCI Japan (EWJ) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ iShares TR Global Energy ETF (IXC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ iShares TR Global Tech ETF (IXN) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ iShares US Financials [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ iShares US Medical Devices (IHI) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ Kraneshares China Internet [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ SPDR Cons Disc Select Sector (XLY) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ SPDR Healthcare Select Sector (XLV) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ SPDR Industrials Select Sector (XLI) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input 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]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES CORE MSCI EMERGING (IEMG) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley ⇒ ISHARES CORE S&P US GROWTH (IUSG) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES CORE S&P US VALUE (IUSV) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES RUSSELL 2000 GRWTH ETF (IWO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley ⇒ ISHARES RUSSELL 2000 VALUE ETF (IWN) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input 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 type="checkbox"/>
Morgan Stanley ⇒ Morgan Stanley Private Bank [OT] DESCRIPTION: Cash holding within IRA		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
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?
Morgan Stanley ⇒ ISHARES CORE MSCI EMERGING (IEMG) [EF]		08/3/2021	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

Position	Name of Organization
Director	Arkansas Forestry Association
Director	Cooper-Anthony Child Advocacy Center

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
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

<ul style="list-style-type: none"><li>Fisher IRA</li><li>Morgan Stanley</li></ul>
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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 , 05/16/2022