



Filing ID #10054892

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Adrian Smith  
**Status:** Member  
**State/District:** NE03

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2022  
**Filing Date:** 05/15/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
CarterBaldwin [PS] DESCRIPTION: Partner stock distribution	SP	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
First National Bank of Omaha (Gering, NE) (Checking) [BA] DESCRIPTION: Same account; new bank name; previously Western States Bank; 3 separate accounts		\$15,001 - \$50,000	Interest	None	<input type="checkbox"/>
Meridian Trust Credit Union (Savings and Checking) [BA] DESCRIPTION: Same account; new name of credit union		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Miller Lake Corporation Location: Laramie, WY [PS] DESCRIPTION: an undivided interest in land and improvements		\$50,001 - \$100,000	None		<input type="checkbox"/>
My Other Garage (storage business) [OL] LOCATION: Gering/Scotts Bluff, NE, US DESCRIPTION: Owner of storage units. Income in the form of rent.		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Nebraska Teacher Retirement [PE]		\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
NEST 529- Income Fund of America CL A [5P]  LOCATION: NE DESCRIPTION: Children college savings		\$15,001 - \$50,000	Mutual Fund/ Investment	None	<input type="checkbox"/>
Platte Valley Bank Savings Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Prin LifeTime Hybrid 2040 CiT [MF]  DESCRIPTION: spouse 401k plan	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Real Estate Rental [RP]  LOCATION: Elkton, VA, US		\$500,001 - \$1,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
Real Estate Rental [RP]  LOCATION: Cheverly, MD, US		\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
Real Estate Rental [RP]  LOCATION: Gering, NE, US		\$50,001 - \$100,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Real Estate Rentals [RP]  LOCATION: Stanley, VA, US DESCRIPTION: 50 percent ownership in real estate rental property		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Riverstone Bank Checking Account [BA]  DESCRIPTION: Checking account for rental property		\$1,001 - \$15,000	None		<input type="checkbox"/>
State Farm Roth IRA - BlackRock International Index [IH]		\$1,001 - \$15,000	None		<input type="checkbox"/>
State Farm Roth IRA - BlackRock S&P 500 Index [IH]		\$15,001 - \$50,000	None		<input type="checkbox"/>
State Farm Roth IRA - BlackRock Small Cap Index [IH]		\$1,001 - \$15,000	None		<input type="checkbox"/>
State Farm Roth IRA - BlackRock Total Return [IH]		\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
State Farm TSA - Bloomington IL [FN]		\$1,001 - \$15,000	None		<input type="checkbox"/>
State Farm Universal Life Insurance [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Vacant lots [RP]		\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
LOCATION: Stanley, VA, US DESCRIPTION: 50 percent ownership in 2 vacant lots adjacent to rental property					

\* 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?
CarterBaldwin [PS] DESCRIPTION: Partner stock	SP	06/18/2022	P	\$1,001 - \$15,000	
CarterBaldwin [PS] DESCRIPTION: Partner stock	SP	01/19/2022	P	\$1,001 - \$15,000	
Real Estate Rental, 50% Interest [OL]  LOCATION: Stanley/ Page Co., VA, US DESCRIPTION: real estate rentals		09/19/2022	P	\$1,000,001 - \$5,000,000	

\* 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
CarterBaldwin	spouse salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	First National Bank of Omaha	October 2019	real estate rental in Gering	\$15,001 - \$50,000
	TD Bank	September 2020	real estate rental in Elkton	\$250,001 - \$500,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
	TD Bank	July 2020	real estate rental in Cheverly	\$250,001 - \$500,000
	Riverstone Bank	September 2022	Loan	\$100,001 - \$250,000
	Riverstone Bank	September 2022	Loan	\$500,001 - \$1,000,000
COMMENTS: 50 percent ownership in rental property at Stanley, VA				

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Leadership Institute's Congressional Advisory Board
Board Member	ThankUSA's Congressional Advisory Board

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

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☒ 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. Adrian Smith , 05/15/2024