



Filing ID #10048624

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Michael C. Burgess  
**Status:** Member  
**State/District:** TX26

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 08/12/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Airlines Group, Inc. (AAL) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Bath & Body Works, Inc. (BBWI) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Formerly L Brands INC. 2021 Stock exchange; is less than PTR reporting threshold. (Michael Ameritrade).					
Brighthouse Financial, Inc. (BHF) [ST]	SP	\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
E Trade (Formerly Capital One Investing Cash Balance) [BA]	SP	\$1 - \$1,000	Interest	None	<input type="checkbox"/>
Fidelity Capital Appreciation [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Cash Reserves [BA]	JT	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Fidelity Contrafund [MF]	JT	\$100,001 - \$250,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
iShares MSCI Austria Capped Investable Market Index Fund (EWO) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
MetLife, Inc. (MET) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mineral Rights [RP]		Undetermined	royalty income	None	<input type="checkbox"/>
LOCATION: multiple counties, TX, US DESCRIPTION: Dale Operating Gas Lease					
Mineral Rights [RP]		Undetermined	royalty income	None	<input type="checkbox"/>
LOCATION: multiple counties, TX, US DESCRIPTION: Titan Operating Gas Lease					
Mineral Rights [RP]	JT	Undetermined	royalty income	None	<input type="checkbox"/>
LOCATION: multiple counties, TX, US DESCRIPTION: Vantage Energy Operating Gas Lease.					
Non Investment Residence [RP]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: Fort Worth, TX, US					
Non Investment Residence [RP]	JT	\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Hot Springs, AR, US					
Northwest Mutual Life Insurance-65 Life 1987-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1988-whole [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1989-whole [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991b-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-90 Life 1997-whole [WU]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual Life Ins Co [WU]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Obsidian Energy Ltd. (OBE) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: formerly PENN WEST PETROLEUM LTD					
OPKO Health Inc. (OPK) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Point Bank [BA]					
	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: checking account					
Primary Residence [RP]	JT	\$1,000,001 - \$5,000,000	Farming income	None	<input type="checkbox"/>
LOCATION: Pilot Point, TX, US					
Southwest Airlines Company (LUV) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST]					
Spouse's Wells Fargo IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Fidelity Adv. Series - Equity Growth Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Pfizer, Inc. (PFE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Stryker Corporation (SYK) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Viatris Inc. (VTRS) [ST]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
TD Ameritrade Insured Deposit [BA]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Money Market					
Toyota Motor Corporation (TM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Undeveloped Property [RP]	JT	\$100,001 - \$250,000	None		<input checked="" type="checkbox"/>
LOCATION: Pilot Point, TX, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Purchase of 2 acres.					
Victoria's Secret & Co. (VSCO) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Formerly L Brands INC. 2021 Stock exchange; is less than PTR reporting threshold. (Michael Ameritrade).					
Wells Fargo Bank Deposit Sweep Combined [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo IRA ⇒ Abbott Laboratories (ABT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ AbbVie Inc. (ABBV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Cigna Corporation (CI) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Ford Motor Company (F) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ General Electric Company (GE) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ International Business Machines Corporation (IBM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ iShares TIPS Bond ETF (TIP) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Nokia Corporation Sponsored American Depository Shares (NOK) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Obsidian Energy Ltd. (OBE) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: formerly Penn West Petroleum LTD					
Wells Fargo IRA ⇒ Southwest Airlines Company (LUV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Stryker Corporation (SYK) [ST]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Texas Instruments Incorporated (TXN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Walt Disney Company (DIS) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wright Patterson Congressional Credit Union [BA]		\$1 - \$1,000	None		<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?
745 Vest Lane, Pilot Point [RP]	JT	11/23/2021	P	\$100,001 - \$250,000	
LOCATION: Pilot Point, TX, US					
DESCRIPTION: Purchase of land.					
Abbott Laboratories (ABT) [ST]		12/2/2021	P	\$1,001 - \$15,000	
DESCRIPTION: purchased 16 additional shares					
Cigna Corporation (CI) [ST]		11/19/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Partial Sale of 100 shares					

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Microsoft Corporation (MSFT) [ST]		12/2/2021	P	\$1,001 - \$15,000	
DESCRIPTION: purchased an additional 28 shares					
Stryker Corporation (SYK) [ST]		10/14/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: the terms of the call are a strike price of \$270 and an expiration date 11/19/21.					
Stryker Corporation (SYK) [ST]	SP	10/19/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: the terms of the call are a strike price of \$280 and an expiration date 12/17/21.					
Stryker Corporation (SYK) [ST]		11/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: The terms of the call are a strike price of \$270, and an expiration of 12/17/21.					
Stryker Corporation (SYK) [ST]		12/21/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: The terms of the call are a strike price of \$270, and an expiration of 1/22/22.					
Stryker Corporation (SYK) [ST]	SP	12/21/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: The terms of the call are a strike price of \$270, and an expiration of 1/21/22.					
Walt Disney Company (DIS) [ST]		12/2/2021	P	\$1,001 - \$15,000	
DESCRIPTION: purchased an additional 33 shares					

\* 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**

None disclosed.

## **SCHEDULE D: LIABILITIES**

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
JT	AmeriHome Mortgage Co	03/21/2018	mortgage on Pilot Point, TX	\$250,001 - \$500,000
JT	Pennymac Loan Services LLC	06/17/2019	mortgage on Hot Springs, AR	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Member of the Board	University of North Texas Foundation
Honorary Co-Chairman	Alliance for Health Policy

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2010	Self / World Net Daily	Publishing Contract

## 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

- Spouse's Wells Fargo IRA (Owner: SP)
- Wells Fargo IRA

## 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. Michael C. Burgess , 08/12/2022