



Filing ID #10041710

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: 2020
Filing Date: 08/9/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-------------------------|----------------|-------------|--------------------------|
| 2112 Blackjack Road, Pilot Point [RP] | JT | \$500,001 - \$1,000,000 | Farming income | None | <input type="checkbox"/> |
| LOCATION: Pilot Point, TX, US | | | | | |
| DESCRIPTION: formerly listed as 30 acres 2000 Blackjack, Aubrey, TX | | | | | |
| 4637 Ivanhoe Dr., Fort Worth, TX [RP] | JT | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| LOCATION: Fort Worth, TX, US | | | | | |
| American Airlines Group, Inc. (AAL) [ST] | | \$1 - \$1,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Brighthouse Financial, Inc. (BHF) [ST] | SP | \$1 - \$1,000 | Dividends | None | <input type="checkbox"/> |
| DESCRIPTION: Brighthouse Financial Inc is a spinoff from the Metlife Inc. Amount is less than the reporting threshold. | | | | | |
| Compass Bank [BA] | JT | None | None | | <input type="checkbox"/> |
| DESCRIPTION: non-interest paying checking account. As of 2020 account is still open however no asset. | | | | | |
| Dale Operating Gas Lease [RP] | | None | None | | <input type="checkbox"/> |
| LOCATION: multiple counties, TX, US | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-----------------------|--------------------------|--------------------|--------------------------|
| E Trade (Formerly Capital One Investing Cash Balance) [BA] | SP | None | Dividends | None | <input type="checkbox"/> |
| DESCRIPTION: 2020 name change. Zero assets in account however account is still open. | | | | | |
| Fidelity Capital Appreciation [MF] | JT | \$1,001 - \$15,000 | Capital Gains, Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| | | | | | |
| Fidelity Cash Reserves [BA] | JT | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| | | | | | |
| Fidelity Contrafund [MF] | JT | \$100,001 - \$250,000 | Dividends | \$5,001 - \$15,000 | <input type="checkbox"/> |
| | | | | | |
| iShares MSCI Austria Capped Investable Market Index Fund (EWO) [ST] | | \$1 - \$1,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| | | | | | |
| L Brands, Inc. (LB) [ST] | | \$1 - \$1,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| | | | | | |
| MetLife, Inc. (MET) [ST] | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| | | | | | |
| 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 [BA] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| | | | | | |
| Note Receivable 1: Wise Co Prop, Lewisville, TX [DO] | | None | None | | <input type="checkbox"/> |
| DESCRIPTION: note receivable decreased in value due to bankruptcy of the debtor, no payments received | | | | | |
| | | | | | |

| 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 [OT] | JT | \$50,001 - \$100,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| DESCRIPTION: checking account | | | | | |
| 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] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| | | | | | |
| 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 type="checkbox"/> |
| | | | | | |
| Spouse's Wells Fargo IRA ⇒ Viatris Inc. (VTRS) [ST] | SP | \$1 - \$1,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Spinoff from Pfizer, no cost purchase. Listed as a Purchase on Schedule B.11/16/2020 | | | | | |
| | | | | | |
| TD Ameritrade Insured Deposit [BA] | | \$1 - \$1,000 | Dividends | None | <input type="checkbox"/> |
| DESCRIPTION: Money Market | | | | | |
| | | | | | |
| Titan Operating Gas Lease [RP] | | None | None | | <input type="checkbox"/> |
| LOCATION: multiple counties, TX, US | | | | | |
| | | | | | |
| Toyota Motor Corporation (TM) [ST] | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| | | | | | |
| Vantage Energy Operating Gas Lease [RP] | JT | None | royalty income | None | <input type="checkbox"/> |
| LOCATION: multiple counties, TX, US | | | | | |
| | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|--------------|-----------------------|-----------------------|---------------|--------------------------|
| 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 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] | | \$1,001 - \$15,000 | 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 type="checkbox"/> |
| DESCRIPTION: Cigna merged with Express Scripts | | | | | |
| Wells Fargo IRA ⇒ Ford Motor Company (F) [ST] | | \$1 - \$1,000 | 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"/> |
| Wells Fargo IRA ⇒ Microsoft Corporation (MSFT) [ST] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Wells Fargo IRA ⇒ | | \$1 - \$1,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|--------------|-----------------------|-----------------------|---------------|--------------------------|
| Nokia Corporation Sponsored American Depository Shares (NOK) [ST] | | | | | <input type="checkbox"/> |
| Wells Fargo IRA ⇒ Obsidian Energy Ltd. (OBE) [ST] DESCRIPTION: formerly Penn West Petroleum LTD | | \$1 - \$1,000 | Tax-Deferred | | <input type="checkbox"/> |
| 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 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 type="checkbox"/> |
| Wright Patterson Congressional Credit Union [BA] | | \$1,001 - \$15,000 | 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? |
|--|--------------|-------------|-----------------|---------------|-------------------------------|
| Spouse's Wells Fargo IRA ⇒ Viatris Inc. (VTRS) [ST] | SP | 11/16/2020 | P | \$0.00 | |
| DESCRIPTION: Amount of transaction \$0.00. Spinoff from Pfizer. No Cost. | | | | | |

* 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

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|--------------|----------------------------|----------------------|----------------------------|----------------------------|
| JT | AmeriHome Mortgage Co | 03/21/2018 | mortgage on Blackjack Road | \$250,001 - \$500,000 |
| JT | Pennymac Loan Services LLC | 06/17/2019 | mortgage on 11 Jaca Place | \$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 , 08/9/2021