



Filing ID #10052309

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Richard Hudson  
**Status:** Member  
**State/District:** NC09

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 05/12/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of America Bank Accounts [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Contributory IRA ⇒ Cash [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Bank Sweep. I talked to Elysia Travis at the Ethics Committee about how to report this.					
Charles Schwab Contributory IRA ⇒ MGIAX MFS International Intrinsic Value A [MF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Charles Schwab Contributory IRA ⇒ NWWFX American Funds New World F1 [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Contributory IRA ⇒ PAREX T Rowe Price Real Estate Advisor [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Contributory IRA ⇒ PEMGX Principal Midcap A [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Contributory IRA ⇒ PRBLX Parnassus Core Equity Investor [MF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Charles Schwab Contributory IRA ⇒ PRTNX Pimco Real Return A [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab Contributory IRA ⇒ PTLAX Pimco Low Duration A [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Contributory IRA ⇒ SKIRX DWS Enhanced Commodity Strategy Inst [MF]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Charles Schwab Contributory IRA ⇒ SKSEX AMG GW&K Small Cap Value N [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Contributory IRA ⇒ VETAX Victory Sycamore Established Value A [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Contributory IRA ⇒ WAIOX Wasatch International Opps Inv [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Charles Schwab Contributory IRA ⇒ YAFFX AMG Yacktman Focused N [MF]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Congressional Federal Credit Union Bank Account [BA]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Congressional Federal Credit Union Bank Accounts [BA]	JT	\$50,001 - \$100,000	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?
Charles Schwab Contributory IRA ⇒ MGIAIX MFS International Intrinsic Value A [MF]		12/8/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Long Term Cap Gain Reinvest					
Charles Schwab Contributory IRA ⇒ PRBLX Parnassus Core Equity Investor [MF]		11/17/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Long Term Cap Gain Reinvest					
Charles Schwab Contributory IRA ⇒ SKIRX DWS Enhanced Commodity Strategy Inst [MF]		09/23/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Dividend					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab Contributory IRA ⇒ YAFFX AMG Yacktman Focused N [MF]		12/15/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Long Term Cap Gain Reinvest					

\* 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
US House of Representatives	spouse salary	N/A
America First Policy Institute	spouse salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Congressional Federal Credit Union	June 23, 2017	Mortgage on primary residence in Concord, NC	\$100,001 - \$250,000
JT	Congressional Federal Credit Union	Feb 4, 2022	Mortgage on primary residence in Concord, NC	\$250,001 - \$500,000
COMMENTS: We refinanced our mortgage on our primary residence in Concord, NC.				
	Congressional Federal Credit Union	Sept 12, 2022	Mortgage on primary residence in Southern Pines, NC	\$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

None disclosed.

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Charles Schwab Contributory 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. Richard Hudson , 05/12/2023