



Filing ID #10060750

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Catherine Templeton
Status: Congressional Candidate
State/District: SC01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 05/13/2024
Period Covered: 01/01/2023– 04/12/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ABB LTD SPONS ADR (ABBNY) [ST]		\$1,001 - \$15,000	None		
Abbott Laboratories Common Stock (ABT) [ST]		\$1,001 - \$15,000	None		
AbbVie Inc. Common Stock (ABBV) [ST]		\$1,001 - \$15,000	None		
Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$1,001 - \$15,000	None		
American Funds Capital World Growth & Income Fund Class A Shares (CWGIX) [MF]		\$15,001 - \$50,000	None		
American Funds Capital World Growth & Income Fund Class C Shares (CWGCX) [MF]		\$15,001 - \$50,000	None		
American Funds Developing World Growth and Income Fund - Class A (DWGAX) [MF]		\$1,001 - \$15,000	None		
American Funds Investment Co of America A (AIVSX) [MF]		\$15,001 - \$50,000	None		
American Funds SMALLCAP World A (SMCWX) [MF]		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apple Inc. - Common Stock (AAPL) [ST]		\$1,001 - \$15,000	None		
Applied Materials, Inc. - Common Stock (AMAT) [ST]		\$1,001 - \$15,000	None		
ASML Holding N.V. - New York Registry Shares (ASML) [ST]		\$1,001 - \$15,000	None		
AstraZeneca PLC - American Depositary Shares (AZN) [ST]		\$1,001 - \$15,000	None		
Automobiles [OT]		\$100,001 - \$250,000	None		
DESCRIPTION: Used Suburban, BMW, Chevy Silverado, Porsche, & Mercedes SUV					
BlackRock Eq Dividend A (MDDVX) [MF]		\$15,001 - \$50,000	None		
BlackRock Money Market Portfolio - Class A (PINXX) [MF]		\$50,001 - \$100,000	None		
BlackRock, Inc. Common Stock (BLK) [ST]		\$1,001 - \$15,000	None		
Blackstone Inc. Common Stock (BX) [ST]		\$1,001 - \$15,000	None		
Boeing Company (BA) [ST]		\$1,001 - \$15,000	None		
Brawley Templeton, LLC [OL]		\$1,000,001 - \$5,000,000	Capital Gains, Interest	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
LOCATION: Charleston, SC, US DESCRIPTION: Brawley Templeton, LLC only current asset is the loan from the Buyout Agreement in October 2023 of RemSom, LLC. One payment November 2023; monthly payments resuming principle and interest January 2024 - December 2025.					
Broadcom Inc. - Common Stock (AVGO) [ST]		\$15,001 - \$50,000	None		
Canadian Natural Resources Limited Common Stock (CNQ) [ST]		\$1,001 - \$15,000	None		
Capital Income Builder Cl A Shs (CAIBX) [MF]		\$1,001 - \$15,000	None		
Capital One Financial Corporation Common Stock (COF) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Caterpillar, Inc. Common Stock (CAT) [ST]		\$1,001 - \$15,000	None		
Celanese Corporation Common Stock (CE) [ST]		\$1,001 - \$15,000	None		
Chevron Corporation Common Stock (CVX) [ST]		\$1,001 - \$15,000	None		
Chubb Limited Common Stock (CB) [ST]		\$1,001 - \$15,000	None		
CME Group Inc. - Class A Common Stock (CME) [ST]		\$1,001 - \$15,000	None		
Comcast Corporation - Class A Common Stock (CMCSA) [ST]		\$1,001 - \$15,000	None		
Constellation Brands, Inc. Common Stock (STZ) [ST]		\$1,001 - \$15,000	None		
Constellation Energy Corporation - Common Stock (CEG) [ST]		\$1,001 - \$15,000	None		
CSX Corporation (CSX) [ST]		\$1,001 - \$15,000	None		
CVS Health Corporation Common Stock (CVS) [ST]		\$1,001 - \$15,000	None		
Danaher Corporation Common Stock (DHR) [ST]		\$1,001 - \$15,000	None		
Darden Restaurants, Inc. Common Stock (DRI) [ST]		\$1,001 - \$15,000	None		
DBA Sempra Common Stock (SRE) [ST]		\$1,001 - \$15,000	None		
Discover Financial Services Common Stock (DFS) [ST]		\$1,001 - \$15,000	None		
Elevance Health, Inc. Common Stock (ELV) [ST]		\$1,001 - \$15,000	None		
Eli Lilly and Company Common Stock (LLY) [ST]		\$1,001 - \$15,000	None		
EOG Resources, Inc. Common Stock (EOG) [ST]		\$1,001 - \$15,000	None		
EXTRA SPACE STORAGE INC (EXR) [RE]		\$1,001 - \$15,000	None		
Exxon Mobil Corporation Common Stock (XOM) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
F.I.S.T. Convertible Securities Fund Class A (FISCX) [MF]		\$50,001 - \$100,000	None		
Federated Hermes Strategic Value Dividend Fund Class A (SVAAX) [MF]		\$100,001 - \$250,000	None		
Franklin Mutual Shares Fund, Class A (TESIX) [MF]		\$50,001 - \$100,000	None		
Future Scholar [5P]		\$250,001 - \$500,000	None		
LOCATION: SC DESCRIPTION: 529 Plans for all three children					
GE Aerospace Common Stock (GE) [ST]		\$1,001 - \$15,000	None		
General Motors Company Common Stock (GM) [ST]		\$1,001 - \$15,000	None		
Gilead Sciences, Inc. - Common Stock (GILD) [ST]		\$1,001 - \$15,000	None		
Half ownership of Home [RP]		\$250,001 - \$500,000	None		
LOCATION: Rockbridge, VA, US					
Halliburton Company Common Stock (HAL) [ST]		\$1,001 - \$15,000	None		
Hartford Capital Appreciation Fund - Class A (ITHAX) [MF]		\$15,001 - \$50,000	None		
Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	None		
Intel Corporation - Common Stock (INTC) [ST]		\$1,001 - \$15,000	None		
Intercontinental Exchange Inc. Common Stock (ICE) [ST]		\$1,001 - \$15,000	None		
Invesco Treasury Portfolio Institutional Class (TRPXX) [MF]		\$250,001 - \$500,000	None		
Johnson & Johnson Common Stock (JNJ) [ST]		\$1,001 - \$15,000	None		
JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Keurig Dr Pepper Inc. (KDP) [ST]		\$1,001 - \$15,000	None		
KKR & Co. Inc. Common Stock (KKR) [ST]		\$1,001 - \$15,000	None		
L3Harris Technologies, Inc. Common Stock (LHX) [ST]		\$1,001 - \$15,000	None		
Land [RP]		\$1,000,001 - \$5,000,000	None		
LOCATION: Teton County, WY, US					
Linde plc - Ordinary Shares (LIN) [ST]		\$1,001 - \$15,000	None		
Loan to RemSom for Buy Out Agreement [DO]		\$1,000,001 - \$5,000,000	Capital Gains, Interest	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
Loomis Sayles Funds - Strategic Income Fund Class A (NEFZX) [MF]		\$15,001 - \$50,000	None		
Marsh & McLennan Companies, Inc. Common Stock (MMC) [ST]		\$1,001 - \$15,000	None		
Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	None		
Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	None		
Municipal Bond - College of Charleston [GS]		\$15,001 - \$50,000	None		
Municipal Bond - Anderson County School [GS]		\$15,001 - \$50,000	None		
Municipal Bond - Piedmont Municipal Power [GS]		\$15,001 - \$50,000	None		
Municipal Bond - SC Jobs - Econ Dev Authority [GS]		\$15,001 - \$50,000	None		
Municipal Bond - SC Transp & Infrastructure Bank [GS]		\$15,001 - \$50,000	None		
Northrop Grumman Corporation Common Stock (NOC) [ST]		\$1,001 - \$15,000	None		
Pacific Life Variable Universal Policy [WU]		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Life Insurance on Spouse					
Paychex, Inc. - Common Stock (PAYX) [ST]		\$1,001 - \$15,000	None		
Pfizer, Inc. Common Stock (PFE) [ST]		\$1,001 - \$15,000	None		
Philip Morris International Inc Common Stock (PM) [ST]		\$1,001 - \$15,000	None		
Regions Savings and Checking Accounts [BA]		\$500,001 - \$1,000,000	None		
RemSom, LLC [OL]		None	None		
LOCATION: Columbia, SC, US					
DESCRIPTION: Partnership Interest sold October 2023					
RTX Corporation Common Stock (RTX) [ST]		\$1,001 - \$15,000	None		
South Carolina Retirement Systems [PE]		\$50,001 - \$100,000	Tax-Deferred		
Target Corporation Common Stock (TGT) [ST]		\$1,001 - \$15,000	None		
Terry Family Leases [MO]		\$1,001 - \$15,000	Dividends	\$5,001 - \$15,000	\$201 - \$1,000
LOCATION: Jefferson and adjacent counties, TX, US					
DESCRIPTION: Various fractional shares of mineral rights in East Texas from spouse's family.					
The Growth Fund of America Class A Shares (AGTHX) [MF]		\$100,001 - \$250,000	None		
The Income Fund of America, Class A Shares (AMECX) [MF]		\$50,001 - \$100,000	None		
Thornburg Investment Income Builder Class A (TIBAX) [MF]		\$100,001 - \$250,000	None		
United of Omaha Life Policy [WU]		\$1,001 - \$15,000	None		
DESCRIPTION: Life Insurance co-owned with filer's sibling on filer's parent					
UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Visa Inc. (V) [ST]		\$1,001 - \$15,000	None		
Washington Mutual Invs Fd Cl A Shs (AWSHX) [MF]		\$15,001 - \$50,000	None		
Wells Fargo & Company Common Stock (WFC) [ST]		\$1,001 - \$15,000	None		
WELLTOWER INC (WELL) [RE]		\$1,001 - \$15,000	None		
Yum! Brands, Inc. (YUM) [ST]		\$1,001 - \$15,000	None		

* 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 Current Year to Filing	Amount Preceding Year
US Brick Holdings, Inc.	Filer salary	N/A	\$235,384.55
Wall Templeton & Haldrup, PA	Spouse Salary	\$150,000.00	\$499,861.94

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Regions Bank	October 2020	Mortgage on primary residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
President	US Brick Holdings, LLC
President	Brawley Templeton LLC
President	One Beckham Foundation, LLC
Member	LexFlex, LLC
Member	RemSom, LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2023	Filer and RemSom, LLC	Filer sold partnership interest back to privately-held partnership, RemSom, LLC.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Catherine Templeton , 05/13/2024