



Filing ID #10062781

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. John Kevin Ellzey Sr  
**Status:** Member  
**State/District:** TX06

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2021  
**Filing Date:** 08/13/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Funds 2035 Trgt Date Retire R6 [MF]  DESCRIPTION: Southwest Airlines Pilots Retirement Savings Plan		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Government Income [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Advisor Equity Income [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Advisor Government Income [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Advisor International Discovery [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Advisor Mid Cap II Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Advisor New Insights Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Roth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Advisor Small Cap Fund [MF]					<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Advisor Strategic Income Fund [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Franklin Mutual Shares Fund - Class A [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Global Life Insurance #9920 [WU]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Liberty National Life Insurance #1475 [WU]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liberty National Life Insurance #3807 [WU]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liberty National Life Insurance #5655 [WU]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liberty National Life Insurance #5901 [WU]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liberty National Life Insurance #6728 [WU]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liberty National Life Insurance #7701 [WU]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Liberty National Life Insurance #9707 [WU]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Navy Federal Credit Union Checking Account [BA]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Navy Federal Credit Union Savings Account [BA]	JT	\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Navy Mutual Permanent "Plus" [WU]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
USAA 529 Age-Based Option 12-13 Moderately Conservative Portfolio [5F] LOCATION: TX COMMENTS: Child 1		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
USAA 529 Age-Based Option 9-11 Moderate Portfolio [5F] LOCATION: TX COMMENTS: Child 2		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?

\* Investment vehicle 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

None disclosed.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount
Southwest Airlines Co	Wages	\$105,747.00
Texas House of Representatives	Wages	\$39,760.00

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Director COMMENTS: Public speaker	Air Boss Leadership Consulting LLC, Midlothian, TX
State House of Representatives	Texas House of Representatives
Pilot	Southwest Airlines Company

## 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 INVESTMENT VEHICLE DETAILS

- Fidelity Roth 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. John Kevin Ellzey Sr, 08/13/2024