



Filing ID #10038524

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Jeff Fortenberry
Status: Member
State/District: NE01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
C. Gregory Write, Inc., 100% Interest [OL]	SP	\$1,001 - \$15,000	S-Corp	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Lincoln/Lancaster, NE, US DESCRIPTION: Writing, editing and research business founded in 2014					
Gloria Deo, Inc., 50% Interest [OL]	JT	\$100,001 - \$250,000	S-Corp Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Lincoln/Lancaster, NE, US DESCRIPTION: Retail Book and Gift Stores COMMENTS: Valuation based on accounting estimates of inventory and income.					
Mainstar Trust FBO Jeffrey Fortenberry IRA ⇒ Practice Management of America, Inc [PS]		\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase of stock through a private placement memorandum in a self directed IRA. The Cash account in the IRA was used to purchase an additional amount of the same stock previously part of the IRA.					
Pepex Biomedical, Inc. [PS]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Medical device research company.					
Piedmont Shopping Center, LLC ⇒ Piedmont Shopping Center [RP]	JT	\$1,000,001 - \$5,000,000	LLC Income	None	<input type="checkbox"/>
LOCATION: Lincoln, Lancaster, NE, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Share of ownership in multiple member LLC. COMMENTS: Asset value of approximately 6M based on estimate of appraisal after completion of real estate rehabilitation and new leases. (20 percent ownership held jointly with spouse)					
Practice Management of America, Inc. [PS]	SP	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Purchase of stock through a private placement memorandum. Company is a management organization for physician groups, headquartered in Commack, New York.					
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement CREF Global Equities [MF]	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement, CREF Stock Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Union Bank Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<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?
Mainstar Trust FBO Jeffrey Fortenberry IRA ⇒ Practice Managment of America, Inc. [PS] LOCATION: US DESCRIPTION: Purchase of stock through a private placement memorandum in a self directed IRA					
Practice Management of America, Inc. [PS]	SP	09/24/2019	P	\$15,001 - \$50,000	
LOCATION: US DESCRIPTION: Purchase of stock through a private placement memorandum					

* 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
C. Gregory Write, Inc	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Cornhusker Bank, Lincoln, NE	December 2015	Guarantor of Real Estate Loan for Piedmont Shopping Center, LLC	\$1,000,001 - \$5,000,000
SP	Union Bank	July 2015	Commercial line of credit for Gloria Deo, Inc.	\$15,001 - \$50,000
JT	Cornhusker Bank, Lincoln, NE	March 2013	Home Mortgage	\$100,001 - \$250,000
JT	Cornhusker Bank, Lincoln, NE	June 2013	Home equity	\$50,001 - \$100,000
SP	Union Bank	July 2015	Construction/ remodel loan for Gloria Deo, Inc.	\$50,001 - \$100,000
JT	Cornhusker Bank	May 2019	Energy loan for added efficiency and heating	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Piedmont Shopping Center, LLC

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

Source	Description	Value
Steve Hill (Lincoln, NE, US)	Two round trip flights to Missouri, and vacation lodging	\$1,061.66

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Intn'l Conservation Caucus Foundation, Band Foundation	03/15/2019	08/22/2020	DC - Nairobi, Kenya and Mara Conservancy - Omaha, Nebraska	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COMMENTS: As member of the State and Foreign Operations Appropriations Subcommittee, I have oversight of diplomatic and certain national security operations, wildlife trafficking, and environmental/conservation initiatives. I am co-chair of the Int'l Conservation Caucus in Congress.							
The Aspen Institute, Inc. (Congressional Program)	05/27/2019	06/2/2019	Omaha - Prague, Czech Republic -	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Washington, DC - Omaha					COMMENTS: As a member of State and Foreign Operations Subcommittee on Appropriations, I have responsibility for diplomatic funding and national security considerations. This was an academic conference focused on China's economic push to Europe, Russian foreign policy, and US/Eurasia policy.		
Republican Main Street Partnership	10/31/2019	11/3/2019	Washington, DC - San Juan - Washington	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
COMMENTS: The trip reviewed various aspects of Puerto Rico's recovery from the hurricane, economic development, drug manufacture, and the quest for better integration into US federal policy on healthcare and other issues.							

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none">Mainstar Trust FBO Jeffrey Fortenberry IRA DESCRIPTION: Stock held in self-directed IRA accountPiedmont Shopping Center, LLC (Owner: JT) LOCATION: Lincoln/Lancasater, NE, USTIAA CREF Retirement Mutual Funds (Owner: SP)
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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. Jeff Fortenberry , 08/13/2020