



Filing ID #10059471

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Marjorie Taylor Mrs Greene  
**Status:** Member  
**State/District:** GA14

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2022  
**Filing Date:** 05/1/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Congressional Federal Credit Union [BA]		\$1,000,001 - \$5,000,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
DC2 IRA ⇒ Bank of America Corporation (BAC) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC3 401k ⇒ 500 Index Fund [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DC3 401k ⇒ Fidelity Intenational Index [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DC3 401k ⇒ Vangaurd Growth Index Fund [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DC3 401k ⇒ Vangaurd Small Cap Index [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DC3 IRA ⇒ Block, Inc. Class A Common Stock, (SQ) [ST]	DC	\$1 - \$1,000	None		<input type="checkbox"/>
DC3 IRA ⇒ Caterpillar, Inc. (CAT) [ST]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DC3 IRA ⇒ Johnson & Johnson (JNJ) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC3 IRA ⇒ Nestle SA Sponsored ADR representing Registered Shares Series B (NSRGY) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC3 IRA ⇒ Schwab Custodial Money Market [BA]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DC3 IRA ⇒ Southern Company (SO) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC3 IRA ⇒ Tesla, Inc. (TSLA) [ST]	DC	\$1 - \$1,000	None		<input type="checkbox"/>
DC3 IRA ⇒ Truist Financial Corporation (TFC) [ST]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC3 IRA ⇒ Walt Disney Company (DIS) [ST]	DC	\$1 - \$1,000	None		<input type="checkbox"/>
Kids college fund ⇒ Path2College DC3 [5P]  LOCATION: GA	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Marconi Drive Office, Inc. [RP]  LOCATION: Alpharetta/ Fulton, GA, US		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
Marjorie 401K ⇒ 500 Index Fund [MF]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Marjorie 401K ⇒ Fidelity International Index [MF]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Marjorie 401K ⇒ Vangaurd Growth Index Fund [MF]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Marjorie 401K ⇒ Vangaurd Small Cap Index [MF]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Marjorie IRA ⇒		\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
ISHARES CORE MSCI EMERGING ETF [OT] DESCRIPTION: Mutual Fund held in managed IRA					
Marjorie IRA ⇒ ISHARES CORE S&P 500 ETF [OT] DESCRIPTION: Mutual Fund held in managed IRA		\$15,001 - \$50,000	None		<input type="checkbox"/>
Marjorie IRA ⇒ ISHARES CORE S&P SMALL CAP ETF [OT] DESCRIPTION: Mutual Fund held in managed IRA		\$1,001 - \$15,000	None		<input type="checkbox"/>
Marjorie IRA ⇒ ISHARES CORE S&P US GROWTH ETF [OT] DESCRIPTION: Mutual Fund held in managed IRA		\$1,001 - \$15,000	None		<input type="checkbox"/>
Marjorie IRA ⇒ ISHARES MSCI TOTL INTL STCK ETF [OT] DESCRIPTION: Mutual Fund held in managed IRA		\$1,001 - \$15,000	None		<input type="checkbox"/>
Taylor Commercial, Inc., 51% Interest [OL]  LOCATION: Alpharetta / Fulton, GA, US DESCRIPTION: Family owned business		\$5,000,001 - \$25,000,000	Ownership Distribution	\$100,001 - \$1,000,000	<input type="checkbox"/>

\* 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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Activision Blizzard, Inc (ATVI) [ST]	JT	01/18/2022	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Advanced Micro Devices, Inc. (AMD) [ST]		02/22/2022	P	\$1,001 - \$15,000	
AFLAC Incorporated (AFL) [ST]		02/22/2022	P	\$1,001 - \$15,000	
Amgen Inc. (AMGN) [ST]		02/22/2022	P	\$1,001 - \$15,000	
Automatic Data Processing, Inc. (ADP) [ST]		02/22/2022	P	\$1,001 - \$15,000	
Caterpillar, Inc. (CAT) [ST]		02/22/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Chevron Corporation (CVX) [ST]		02/22/2022	P	\$1,001 - \$15,000	
Clorox Company (CLX) [ST]		02/22/2022	P	\$1,001 - \$15,000	
JP Morgan Chase & Co. (JPM) [ST]	JT	01/19/2022	P	\$1,001 - \$15,000	
Lockheed Martin Corporation (LMT) [ST]		02/22/2022	P	\$1,001 - \$15,000	
Medtronic plc. Ordinary Shares (MDT) [ST]	JT	01/19/2022	P	\$1,001 - \$15,000	
Nestle SA Sponsored ADR representing Registered Shares Series B (NSRGY) [ST]	JT	01/19/2022	P	\$1,001 - \$15,000	
NextEra Energy, Inc. (NEE) [ST]		02/22/2022	P	\$1,001 - \$15,000	
Perry IRA ⇒ Costco Wholesale Corporation (COST) [ST]	SP	06/10/2022	P	\$15,001 - \$50,000	
Perry IRA ⇒ Goldman Sachs Group, Inc. (GS) [ST]	SP	06/10/2022	P	\$1,001 - \$15,000	
Perry IRA ⇒ Home Depot, Inc. (HD) [ST]	SP	06/10/2022	P	\$15,001 - \$50,000	
Perry IRA ⇒ Intel Corporation (INTC) [ST]	SP	06/10/2022	P	\$1,001 - \$15,000	
Perry IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]	SP	06/10/2022	P	\$15,001 - \$50,000	
Perry IRA ⇒ Nestle SA Sponsored ADR representing Registered Shares Series B (NSRGY) [ST]	SP	06/10/2022	P	\$15,001 - \$50,000	
Perry IRA ⇒ Procter & Gamble Company (PG) [ST]	SP	06/10/2022	P	\$1,001 - \$15,000	
Perry IRA ⇒ United Parcel Service, Inc. (UPS) [ST]	SP	06/10/2022	P	\$15,001 - \$50,000	
Perry IRA ⇒ Visa Inc. (V) [ST]	SP	06/10/2022	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Walgreens Boots Alliance, Inc. (WBA) [ST]		02/22/2022	P	\$1,001 - \$15,000	

\* 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 C: EARNED INCOME

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	UCB	2020	Loan for property for Marconi Drive Offices, LLC	\$100,001 - \$250,000

## 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 INVESTMENT VEHICLE DETAILS

- DC2 IRA (Owner: DC)  
DESCRIPTION: Taylor's IRA
- DC3 401k (Owner: DC)
- DC3 IRA (Owner: DC)  
DESCRIPTION: Derek's IRA
- Kids college fund (Owner: JT)  
LOCATION: GA

- Marjorie 401K
- Marjorie IRA
- Perry IRA (Owner: SP)

## 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. Marjorie Taylor Mrs Greene , 05/1/2024