



Filing ID #10038477

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Lucia Kay McBath  
**Status:** Member  
**State/District:** GA06

## 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?
1 Acre Lot [RP]	SP	\$50,001 - \$100,000	Capital Gains	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LOCATION: Rockford/Blount, TN, US					
AT&T Inc. (T) [ST]	SP	\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Cambiar Global Ultra Focus [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Deutsche X Trackers MSCO EAFE Hedged Equity FTF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Exxon Mobil Corporation (XOM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Contra Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Contra Fund Comingled Pool [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Extended Market Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity International Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Large Cap Growth [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Fidelity S&P 500 Index Fund [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Small Cap Discovery [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	<input type="checkbox"/>
Fidelity Small/Mid Cap Index Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Small/Mid Growth Index Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Total Market Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity US Bond Index Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares 7 - 10 Year Treasury Bond ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Core US Aggregate Bond ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
iShares MSCI EAFE Small Cap ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
iShares Russell 2000 ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SPDR S&P 500 ETF [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
SPDR S&P Mid Cap 400 ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Vanguard FTSE Developed Markets ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Vanguard Intermediate Term Corp Bond ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Walthausen Small Cap Fund [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE B: TRANSACTIONS

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
1 Acre Lot [RP]	SP	07/1/2019	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>

LOCATION: Rockford/Blount, TN, US

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

<b>Source</b>	<b>Type</b>	<b>Amount</b>
Delta Airlines	Spouse salary	\$87,000.00

## SCHEDULE D: LIABILITIES

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
	American Express	12/18	revolving charge card	\$10,000 - \$15,000

## SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Founder	Champion In the Making Legacy Foundation
Founder	Jordan's Hope

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

<b>Source</b>	<b>Description</b>	<b>Value</b>
Estate of Samuel McBath (Rockford, TN, US)	Cash Inheritance	\$250,000.00

Source	Description	Value
COMMENTS: Inheritance belongs to spouse; from grandparents;		

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Education Foundation	08/4/2019	08/12/2019	Atlanta, GA - Tel Aviv, Israel - Jerusalem, Israel - Tiberias, Israel - Atlanta, GA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
First Coast Leadership Foundation	04/6/2019	04/6/2019	New York City, NY - Jacksonville, FL - Atlanta, GA	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
National Action Network	04/5/2019	04/6/2019	Washington, DC - New York City, NY - N/A	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

None disclosed.

## 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. Lucia Kay McBath , 08/13/2020