



Filing ID #10037717

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Bruce Westerman
Status: Member
State/District: AR04

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/12/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Fisher IRA ⇒ Cash within IRA [OT] DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Fisher IRA ⇒ Credit Suisse FI Large Cap Growth Enhanced ETN (FLGE) [EF] DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Fisher IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF] DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>
Fisher IRA ⇒ Invesco S&P 500 Top 50 ETF (XLG) [EF] DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Fisher IRA ⇒ ISHARES INC MSCI JPN ETF NEW (EWJ) [EF] DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Europe Financials Sector Index Fund (EUFN)		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
[EF]				
DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K				
Fisher IRA ⇒ iShares MSCI Eurozone ETF (EZU) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K				
Fisher IRA ⇒ iShares MSCI Global Select Metals & Mining Producers Fund (PICK) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K				
Fisher IRA ⇒ iShares TR Global Energy ETF (IXC) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K				
Fisher IRA ⇒ iShares TR Global Tech ETF (IXN) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K				
Fisher IRA ⇒ SELECT SECTOR SPDR TR HEALTHCARE (XLV) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K				
Fisher IRA ⇒ Select Sector SPDR Trust SBI CONS DISCR ETF (XLY) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ Select Sector SPDR Trust SBI INT-INDS ETF (XLI) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input checked="" type="checkbox"/>
Fisher IRA ⇒ UBS AG UBS AG FI Enhanced Global High Yield ETN due March 3, 2026 (FIHD) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K				
Fisher IRA ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K				
Fisher IRA ⇒ Vanguard FTSE European ETF (VGK) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Fisher IRA rolled over from Mid South Engineering PSP 401K				
Morgan Stanley ⇒ ISHARES CORE MSCI EAFE ETF (IEFA) [EF]		\$50,001 - \$100,000	Tax-Deferred	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Morgan Stanley ⇒ ISHARES CORE MSCI EMERGING (IEMG) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES CORE S&P US GROWTH (IUSG) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES CORE S&P US VALUE (IUSV) [EF]		\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES RUSSELL 2000 GRWTH ETF (IWO) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES RUSSELL 2000 VALUE ETF (IWN) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES RUSSELL MIDCAP G ETF (IWP) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Morgan Stanley ⇒ ISHARES RUSSELL MIDCAP V ETF (IWS) [EF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
Morgan Stanley ⇒ Morgan Stanley Private Bank [OT]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Cash holding within IRA				
State of Arkansas Pension [PE]	SP	Undetermined	Tax-Deferred	<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?
Fisher IRA ⇒ Barclays ETN FI Enhanced Europe 50 Exchange Traded Notes Series C (FFEU) [ST]		07/24/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ Credit Suisse FI Large Cap Growth Enhanced ETN (FLGE) [ST]		09/18/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]		07/24/2019	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fisher IRA ⇒ iShares Global Energy ETF (IXC) [ST]		01/10/2019	P	\$1,001 - \$15,000	
Fisher IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]		09/18/2019	P	\$1,001 - \$15,000	
Fisher IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [ST]		01/10/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ SPDR Select Sector Fund - Industrial (XLI) [ST]		09/18/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ ISHARES CORE MSCI EAFE ETF [EF]		06/21/2019	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ ISHARES CORE MSCI EAFE ETF [EF]		12/23/2019	P	\$1,001 - \$15,000	

* 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
Lakeside School District	spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	US BANK	December 2014	Equity Line - Home	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Arkansas Forestry Association
Director	Cooper-Anthony Child Advocacy Center

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
August 2011	Spouse and State of Arkansas	Spouse has an agreement with the State of Arkansas for a pension based on prior employment

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
ACU Foundation	08/28/2019	09/2/2019	Little Rock - Tokyo - Little Rock	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Fisher IRA
- Morgan Stanley

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. Bruce Westerman , 08/12/2020