



Filing ID #10046886

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Lloyd Doggett  
**Status:** Member  
**State/District:** TX35

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 08/11/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
3800 Kennelwood [RP]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
LOCATION: Austin / Travis, TX, US					
Akre Focus Fund (AKRIX) [MF]		\$500,001 - \$1,000,000	Capital Gains	\$15,001 - \$50,000	<input type="checkbox"/>
American Century Ultra Fund (TWCUX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Bank OZK [BA]		\$100,001 - \$250,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Berkshire Hathaway Inc. New (BRK.B) [ST]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Brian Walters/Catherine Doggett Promissory Note [OT]		\$250,001 - \$500,000	Interest	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: Promissory Note					
Brown Advisory - Beutel Goodman LCV Fd (BVALX) [MF]		\$500,001 - \$1,000,000	Dividends	\$50,001 - \$100,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Brown Advisory Global Leaders Investor (BAFLX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Brown Advisory Sustainable Growth Instl (BAFWX) [MF]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Calvert Small Cap Fund;I (CSVIX) [MF]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Coca-Cola Company (KO) [ST]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Cohen & Steers Pfd Secs @ Inc Cl I (CPXIX) [MF]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Congressional Federal Credit Union [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DL3 Holdings, LLC [RP]		\$50,001 - \$100,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Austin, TX, US					
Driehaus Micro Cap Growth (DMCRX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input type="checkbox"/>
Edgewood Growth Fund Institutional (EQFIX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
FPA New Income (FPNIX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Franklin Mutual Shares Fund [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Home and Rental Property #1 [RP]		\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Austin / Travis, TX, US					
Home Depot, Inc. (HD) [ST]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
International Business Machines Corporation (IBM) [ST]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Johnson & Johnson (JNJ) [ST]		\$100,001 -	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$250,000			
Kyndryl Holdings, Inc. (KD) [ST]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Metropolitan West Unconstrained Bond Fund Class 1 (MWCIX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Mineral Interest, McFarland Tract [RP]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: Ward Co., TX, US					
Nuveen All American Municipal Bond Fund (FAARX) [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Nuveen Intermediate Duration Muni Bond (NUVBX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Oakmark International (OAKIX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Parnassus Core Equity Fund;Institutional (PRILX) [MF]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
PIMCO Income Fund (PIMIX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
PPG Industries, Inc. (PPG) [ST]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Procter & Gamble Company (PG) [ST]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Prosperity Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Cash Account					
RBC Global Opportunities (RGOIX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Rental Property #2 [RP]		\$1,000,001 - \$5,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Austin / Travis, TX, US					
Schwab International Index Fund (SWISX) [MF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Schwab Muni Money Fund (SWTXX) [MF]		\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Schwab Premier Bank [BA]		\$250,001 - \$500,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Schwab Short-Term Bond Index Fund (SWSBX) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Schwab US Aggregate Bond Index Fund (SWAGX) [MF]		\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Schwab Value Advantage (SWVXX) (formerly Cash IRA) [MF]	SP	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
TIAA-CREF Retirement - Stock Fund [MF]		\$50,001 - \$100,000	None		<input type="checkbox"/>
TIAA-CREF Retirement Global Equities Fund [MF]		\$50,001 - \$100,000	None		<input type="checkbox"/>
TIAA-CREF Retirement- Real Estate Fund [MF]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Vanguard Energy Fund Investor (VGENX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard Extended Mkt Index Admiral (VEXAX) [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Growth Index Fund Admiral (VIGAX) [MF]		\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard High Yield Tax Exempt (VWALX) [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Int. Term Tax-Exempt Fund Admiral (VWIUX) [MF]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard Intermediate-Term Investment-Grade Admiral (VFIDX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard Long-Term Corp Admiral (VWETX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Ltd. Term Tax-Exempt Fund Admiral (VMLUX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Mid-Cap Value Index (VMVAX) [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Municipal Money Market Fund;Investor (VMSXX) [MF]		\$100,001 - \$250,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Vanguard PRIMECAP Fund Admiral (VSMAX) [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Vanguard Selected Value Fund (VASVX) [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
Vanguard Short Term Bond (VBIRX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Short Term Investment-Grade Admiral (VFSUX) [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Small-Cap Index Fund Inv (VSMAX) [MF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Vanguard Total Bond Market Index Admiral (VBTLX) [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard Total Int Stock Index Admiral (VTIAX) [MF]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Total International Bond Index Admiral (VTABX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Total Stock Market [MF]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard U.S. Growth Fund Admiral (VWUAX) [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Vanguard Windsor II Fund (VWNAX) [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
WisdomTree US Dividend Growth ETF (DGRW) [EF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	<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>
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\* 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>
American Century Ultra Inv (TWCUX) [MF]		12/1/2021	P	\$15,001 - \$50,000	
Brian Walters/Catherine Doggett Promissory Note [OT]		10/16/2021	P	\$250,001 - \$500,000	
LOCATION: US					
DESCRIPTION: Promissory Note					
Brown Advisory Beutel Goodman Large-Cap Value Fund Instl (BVALX) [MF]		12/14/2021	P	\$50,001 - \$100,000	
Calvert Small Cap Fund;I (CSVIX) [MF]		09/10/2021	P	\$15,001 - \$50,000	
Calvert Small-Cap I (CSVIX) [MF]		12/7/2021	P	\$15,001 - \$50,000	
Coca-Cola Company (KO) [ST]		04/5/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
Coca-Cola Company (KO) [ST]		07/2/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest shares					
Coca-Cola Company (KO) [ST]		10/4/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
Coca-Cola Company (KO) [ST]		12/15/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest shares					
Cohen & Steers Preferred Securities & Income Fund;I (CPXIX) [MF]		Monthly	P	\$1,001 - \$15,000	
FPA New Income (FPNIX) [MF]		09/10/2021	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Franklin Mutual Shares Fund;Z (MUTHX) [MF]		12/17/2021	P	\$15,001 - \$50,000	
Home Depot, Inc. (HD) [ST]		03/26/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Reinvest Shares					
Home Depot, Inc. (HD) [ST]		06/18/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
Home Depot, Inc. (HD) [ST]		09/17/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
Home Depot, Inc. (HD) [ST]		12/16/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest shares					
International Business Machines Corporation (IBM) [ST]		03/11/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
International Business Machines Corporation (IBM) [ST]		06/11/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
International Business Machines Corporation (IBM) [ST]		09/13/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
International Business Machines Corporation (IBM) [ST]		12/10/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest shares					
Kyndryl Holdings, Inc. (KD) [ST]		11/4/2021	P	\$1,001 - \$15,000	
Metropolitan West Unconstrained Bond Fund Class 1 (MWCIX) [MF]		09/10/2021	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Oakmark International Fund;Investor (OAKIX) [MF]		12/16/2021	P	\$1,001 - \$15,000	
Parnassus Core Equity Fund;Institutional (PRILX) [MF]		09/10/2021	P	\$250,001 - \$500,000	
Parnassus Core Equity Institutional (PRILX) [MF]		11/18/2021	P	\$15,001 - \$50,000	
PIMCO Income Fund (PIMIX) [MF]		09/10/2021	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
PPG Industries, Inc. (PPG) [ST]		03/15/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
PPG Industries, Inc. (PPG) [ST]		06/14/2021	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
DESCRIPTION: Reinvest Shares					
PPG Industries, Inc. (PPG) [ST]		09/13/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
PPG Industries, Inc. (PPG) [ST]		12/10/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest shares					
Procter & Gamble Company (PG) [ST]		02/17/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
Procter & Gamble Company (PG) [ST]		05/18/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
Procter & Gamble Company (PG) [ST]		08/17/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
Procter & Gamble Company (PG) [ST]		11/16/2021	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvest Shares					
RBC Global Opportunities (RGOIX) [MF]		09/10/2021	P	\$15,001 - \$50,000	
RBC Global Opportunities (RGOIX) [MF]		12/21/2021	P	\$15,001 - \$50,000	
Schwab Municipal Money Fund;Investor (SWTXX) [MF]		01/5/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
Schwab Short-Term Bond Index Fund (SWSBX) [MF]		08/11/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
Schwab Short-Term Bond Index Fund (SWSBX) [MF]		08/12/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
Vanguard Energy Fund Investor Shares (VGENX) [MF]		12/29/2021	P	\$1,001 - \$15,000	
Vanguard Growth Index Fund (VIGAX) [MF]		Quarterly	P	\$1,001 - \$15,000	
Vanguard High-Yield Tax Exempt (VWALX) [MF]		09/10/2021	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Vanguard Intermediate-Term Investment-Grade Fd (VFIDX) [MF]		03/31/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Intermediate-Term Investment-Grade Fd (VFIDX) [MF]		12/29/2021	P	\$1,001 - \$15,000	
Vanguard Intermediate-Term Tax-Exempt Fund (VWIUX) [MF]		Monthly	P	\$1,001 - \$15,000	
Vanguard Long-Term Investment-Grade Fund (VWETX) [MF]		12/29/2021	P	\$1,001 - \$15,000	
Vanguard Mid-Cap Value Index Fund (VMVAX) [MF]		Quarterly	P	\$1,001 - \$15,000	
Vanguard Municipal Money Market Fund (VMSXX) [MF]		07/29/2021	P	\$100,001 - \$250,000	
Vanguard Municipal Money Market Fund (VMSXX) [MF]		08/2/2021	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
Vanguard PRIMECAP Fund;Admiral (VPMAX) [MF]		12/20/2021	P	\$100,001 - \$250,000	
Vanguard Selected Value Fund (VASVX) [MF]		12/20/2021	P	\$100,001 - \$250,000	
Vanguard Small-Cap Index Fund (VSMAX) [MF]		12/23/2021	P	\$1,001 - \$15,000	
Vanguard Total International Bond Index Fund (VTABX) [MF]		12/22/2021	P	\$1,001 - \$15,000	
Vanguard Total International Stock Index Fund (VTIAX) [MF]		Quarterly	P	\$1,001 - \$15,000	
Vanguard Total Stock Market (VTSMX) [MF]		Quarterly	P	\$1,001 - \$15,000	
Vanguard US Growth Fund;Admiral (VWUAX) [MF]		12/15/2021	P	\$50,001 - \$100,000	
Vanguard US Growth Fund;Admiral (VWUAX) [MF]		07/29/2021	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Vanguard Windsor II Fund (VWNFX) [MF]		12/30/2021	P	\$15,001 - \$50,000	

\* 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
Texas ERS/JRS	State Legislative/Judicial Annuity	\$69,995.00
Education Consultant	Spouse	\$1,908.00

## SCHEDULE D: LIABILITIES

Owner Creditor	Date Incurred	Type	Amount of Liability
Prosperity Bank, Austin (formerly Liberty Bank, Austin)	August 2005	Letter of Credit on 6374 Spicewood Springs	\$250,001 - \$500,000

## 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.

## 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. Lloyd Doggett , 08/11/2022