



Filing ID #10041201

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Robert J. Wittman  
**Status:** Member  
**State/District:** VA01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 08/24/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
401 (a) Cash Match Plan [OT]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Commonwealth of Virginia 401 (a) Cash Match Plan					
457 Deferred Compensation Plan [OT]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Commonwealth of Virginia 457 Deferred Compensation Plan 25% Asset Allocation Funds 75% Stock Funds					
Anthem, Inc. (ANTM) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
AXA Equitable Life Ins Co ⇒ AXA/Legg Mason Strat Alloc GB [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Ishares S&P US PFD Stk Idx Fd [MF]		None	None		<input type="checkbox"/>
Met Life (Universal Life Insurance) [WU]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Met Life (Universal Life Insurance) [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Met Life Inc. 6.5% Series B [WU]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley ⇒ AB Global Bond Adv [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ AbbVie Inc. (ABBV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Allergan plc Ordinary Shares (AGN) [ST]		None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ American Express Company (AXP) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ American Express Company (AXP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ American Express Company (AXP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ AMG Timessquare Intl Sm Cap [MF]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley ⇒ Anthem, Inc. (ANTM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Anthem, Inc. (ANTM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Becton, Dickinson and Company (BDX) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Blackrock Strategic Inc Opp I [MF]		None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Blackrock Strategic Inc Opp 1 [MF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley ⇒ BlackRock, Inc. (BLK) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Charles Schwab Corporation (SCHW) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Chevron Corporation (CVX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Chevron Corporation (CVX) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley ⇒ Chubb Limited (CB) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ CME Group Inc. - Class A (CME) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Colgate-Palmolive Company (CL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Comcast Corporation - Class A (CMCSA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ CVS Health Corporation (CVS) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley ⇒ CyrusOne Inc (CONE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ D/B/A Chubb Limited New (CB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Dominion Energy Corporation [MF]		None	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley ⇒ Duke Energy Corporation (DUK) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Duke Realty Corporation (DRE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley ⇒ Exxon Mobil Corporation (XOM) [ST]		None	None		<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Fidelity National Information Services, Inc. (FIS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ First Eagle Overseas I [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley ⇒ Hartford Financial Services Group, Inc. (HIG) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Honeywell International Inc. (HON) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Ingersoll-Rand plc (IR) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ International Flavors & Fragrances, Inc. (IFF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ International Flavors & Fragrances, Inc. (IFF) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Ishares Edge MSCI Min Vol EAFE [MF]		None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Ishares Edge MSCI MIN VOL EAFE [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley ⇒ ITT Corporation Common Stock New (ITT) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Johnson & Johnson (JNJ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Linde plc Ordinary Share (LIN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley ⇒ Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Lowe's Companies, Inc. (LOW) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Marriott International - Class A (MAR) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Marsh & McLennan Companies, Inc. (MMC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ McDonald's Corporation (MCD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Metropolitan West Total Return [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Morgan Stanley ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Mondelez International, Inc. - Class A (MDLZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Morgan Stanley Bank Money Market [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Motorola Solutions, Inc. (MSI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Nationwide Geneva Smcp Gw F [MF]		None	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley ⇒ Nationwide Geneva SMCP GW F (NWKDX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Neuberger Intrinsic Value Inst [MF]					
Morgan Stanley ⇒ NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Packaging Corporation of America (PKG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Peoples Bankshares, Inc [PS]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Peoples Community Bank Stock					
Morgan Stanley ⇒ People's United Financial, Inc. (PBCT) [ST]		None	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley ⇒ Pepsico, Inc. (PEP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Philip Morris International Inc (PM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Phillips 66 (PSX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Piedmont Office Realty Trust, Inc. Class A (PDM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Principal Midcap Instl [MF]		\$15,001 - \$50,000	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
Morgan Stanley ⇒ Principal Preferred Sec Inst [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Morgan Stanley ⇒ Principal Spc Pfr&Sec Inc i [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Morgan Stanley ⇒ Principal Spc Prf&Sec Inc I [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Morgan Stanley ⇒ Realty Income Corporation (O) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley ⇒ Texas Instruments Incorporated (TXN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Trane Technologies plc (TT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Union Pacific Corporation (UNP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Vanguard Total Bond Market [MF]		None	None		<input type="checkbox"/>
Morgan Stanley ⇒ Verizon Communications Inc. (VZ) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Morgan Stanley ⇒ Virtus Vontobel Foreign Opp I [MF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Morgan Stanley ⇒ Walt Disney Company (DIS) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ WEC Energy Group, Inc. (WEC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley ⇒ Xylem Inc. Common Stock New (XYL) [ST]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Bank N.A. [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Alliance Bernstein Income Adv [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Boston Scientific Corporation (BSX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Cons Discret Sel Sect SPDR [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Dollar General Corporation (DG) [ST]					
Morgan Stanley INH IRA ⇒ Dollar General Corporation (DG) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Exxon Mobil Corporation (XOM) [ST]		None	None		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Rising Div Achiev [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Utlts Alphadex EFT [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ First Trust Utlts Alphadex ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ FT-Preferred Secur & Inc ETF [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Global X US Inf Dev ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Goldman Activebeta US LC ETF [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Guggenheim Macro Opport I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Health Care Sel Sect Spdr Fd [MF]		None	None		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco Aerospace & Defense EFT [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco QQQ TR [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco S&P 500 Equal Weight ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco S&P 500 High Beta ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley INH IRA ⇒ Invesco S&P Equal Weight E [MF]		None	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares 20+yr Treasu Bond ETF [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Eafe EF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Emerging [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Europe (IEUR) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core S&P 500 ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Edge MSCI Min Vol USA [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI Asia Ex Japan ETF [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI Canada ETF [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI Eafe ETF [MF]		None	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI Eafe Grwth ETF (EFG) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI EAFAE Val ETF (EFV) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares S&P 500 Val ETF (IVE) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares US Consumer Goods ETF [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares US Fin Services ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley INH IRA ⇒ Ishares US Medical Dev ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares US Technology ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ JP Morgan Betabuilders Japan ET [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ JP Morgan Income Builder I [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ JPM Diversified Ret Intl WQ (JPIN) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Lowe's Companies, Inc. (LOW) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Principal GLB Dives Inc West [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Progressive Corporation (PGR) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ ProLogis, Inc. (PLD) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Proshares RSL 2000 DVD ETF [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Starbucks Corporation (SBUX) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Target Corporation (TGT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ The Financial Sel Sect SPDR FD [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Stanley INH IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanec Fallen Angel High Yield (ANGL) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Vanguard Intermediate Term Cor (VCIT) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Virtus Vontobel Foreign Opp [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Wisdomtree US Largecap Div Fnd [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
National Western Life Annuity [OT]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: This is a 403b TSA					
Peoples Community Bank Accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Putnam Ultra Short Duration Income PSDTX [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Rental House - Nags Head, NC [RP]	JT	\$500,001 - \$1,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Nags Head, NC, US					
Rental Property - Montross VA [RP]	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Montross, VA, US					
Schwab INH IRA ⇒ Invesco Russell 1000 R Dyn ETF [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Virginia Commonwealth Bank Money Market Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Virginia Retirement System [PE]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Virginia Retirement System [PE]		\$100,001 - \$250,000	None		<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?
Charles Schwab Corporation (SCHW) [ST]	JT	01/10/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ AbbVie Inc. (ABBV) [ST]		02/27/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Allergan plc Ordinary Shares (AGN) [ST]		03/30/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ American Express Company (AXP) [ST]		10/16/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ AMG Timessquare Intl Sm Cap I [MF]		06/26/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Anthem, Inc. (ANTM) [ST]		10/16/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Becton, Dickinson and Company (BDX) [ST]		05/22/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Becton, Dickinson and Company (BDX) [ST]		05/27/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Blackrock Strategic Inc Opp (BSIIX) [MF]		06/26/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Morgan Stanley ⇒ Charles Schwab Corporation (SCHW) [ST]		10/16/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Costco Wholesale Corporation (COST) [ST]		07/2/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley ⇒ Crown Castle International Corp. (CCI) [ST]		07/2/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ CVS Health Corporation (CVS) [ST]		07/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Duke Energy Corporation (DUK) [ST]		07/2/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ First Eagle Overseas I [MF]		06/26/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Home Depot, Inc. (HD) [ST]		07/2/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ International Flavors & Fragrances, Inc. (IFF) [ST]		10/16/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Ishares Edge MSCI Min Vol USA [MF]		06/26/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Kimberly-Clark Corporation (KMB) [ST]		07/2/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ McDonald's Corporation (MCD) [ST]		04/6/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		03/30/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Motorola Solutions, Inc. (MSI) [ST]		06/22/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ Nationwide Geneva SMCP GW F (NWKDX) [MF]		03/11/2020	P	\$1,001 - \$15,000	
Morgan Stanley ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		06/22/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Royal Gold, Inc. (RGLD) [ST]		07/2/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley ⇒ Virtus Vontobel Foreign Opp I [MF]		10/16/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley ⇒ Visa Inc. (V) [ST]		07/2/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Blackrock Strategic Inc Opp (BSIIX) [MF]		11/17/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Boston Scientific Corporation (BSX) [ST]		10/2/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Cons Direct Sel Sect SPDR [MF]		03/25/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Exxon Mobil Corporation (XOM) [ST]		05/21/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ First Trust Utils Alphadex ETF [MF]		03/20/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Health Care Sel Sect Spdr Fd [MF]		10/6/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco Aerospace & Defense ETF [MF]		03/20/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco S&P 500 Equal Weight ETF [MF]		03/10/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Invesco S&P 500 High Beta ETF (SPHB) [MF]		11/17/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Ishares 20+yr Treasu Bond ETF [MF]		03/10/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares Core MSCI Europe (IEUR) [MF]		11/17/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Ishares Edge MSCI Min Vol USA [MF]		03/10/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI Asia Ex Japan ETF [MF]		10/21/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Morgan Stanley INH IRA ⇒ Ishares MSCI Canada ETF [MF]		03/20/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI Eafe ETF [MF]		10/16/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ Ishares MSCI EAFE Val ETF (EFV) [MF]		11/17/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Ishares S&P 500 Val ETF (IVE) [MF]		11/17/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Ishares US Consumer Goods [MF]		10/23/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ JPM Diversified Ret Intl WQ (JPIN) [MF]		11/17/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Lowe's Companies, Inc. (LOW) [ST]		05/21/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Microsoft Corporation (MSFT) [ST]		10/2/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Progressive Corporation (PGR) [ST]		10/2/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Target Corporation (TGT) [ST]		03/10/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ The Financial Sector SPDR FD [MF]		03/26/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley INH IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		10/2/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley INH IRA ⇒ Van Eck Fallen Angel High Yield (ANGL) [MF]		11/17/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒ Vanguard Intermediate Term Cor (VCIT) [MF]		05/26/2020	P	\$1,001 - \$15,000	
Morgan Stanley INH IRA ⇒		03/20/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Wisdomtree US Largecap Div Fnd [MF]					
Schwab account ⇒ CVS Health Corporation (CVS) [ST]		12/31/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Schwab account ⇒ People's United Financial, Inc. (PBCT) [ST]		12/31/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
Schwab account ⇒ Walt Disney Company (DIS) [ST]		11/20/2020	S	\$1,001 - \$15,000	<input checked="" 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 C: EARNED INCOME

<b>Source</b>	<b>Type</b>	<b>Amount</b>
Westmoreland County Public Schools	Spouse salary	N/A

## SCHEDULE D: LIABILITIES

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
JT	Bank of Lancaster, Virginia	Feb 2012	Mortgage on residence (through July 2020)	\$100,001 - \$250,000
JT	Blue Ridge Bank	November 2018	Real property at Nags Head, NC	\$500,001 - \$1,000,000
JT	Flagstar Bank	June 2019	Mortgage on rental - Montross, VA	\$100,001 - \$250,000
JT	Wells Fargo Mortgage	July 2020	Mortgage on residence	\$100,001 - \$250,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

<b>Date</b>	<b>Parties To</b>	<b>Terms of Agreement</b>
August 1981	Virginia Retirement System	Defined Benefit

## **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 ASSET CLASS DETAILS**

- AXA Equitable Life Ins Co (Owner: SP)
- Morgan Stanley
- Morgan Stanley (Owner: SP)  
LOCATION: US
- Morgan Stanley INH IRA
- Morgan Stanley INH IRA (Owner: SP)
- Schwab account  
LOCATION: US
- Schwab INH IRA

## **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. Robert J. Wittman , 08/24/2021