



Filing ID #10046810

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Jeff Fortenberry
Status: Former Member
State/District: NE01

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2022
Filing Date: 07/31/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
C. Gregory Write, Inc., 100% Interest [OL]	SP	\$1,001 - \$15,000	S-Corp	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Lincoln/Lancaster, NE, US					
DESCRIPTION: Writing, editing and research business founded in 2014					
Gloria Deo, Inc., 50% Interest [OL]	JT	\$100,001 - \$250,000	S-Corp Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Lincoln/Lancaster, NE, US					
DESCRIPTION: Retail Book and Gift Stores					
Mainstar Trust FBO Jeffrey Fortenberry IRA ⇒ Practice Management of America, Inc [PS]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: Purchase of stock through a private placement memorandum in a self directed IRA. The Cash account in the IRA was used to purchase an additional amount of the same stock previously part of the IRA.					
Pepex Biomedical, Inc. [PS]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Medical device research company.					
Piedmont Shopping Center, LLC ⇒ Piedmont Shopping Center [RP]		\$250,001 - \$500,000	LLC income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Lancaster, NE, US					
DESCRIPTION: Share of ownership in multiple member LLC					
Practice Management of America, Inc. [PS]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Purchase of stock through a private placement memorandum. Company is a management organization for physician groups, headquartered in Commack, New York.					
Promissory note [DO]		\$50,001 - \$100,000	Interest	None	<input type="checkbox"/>
Stella Maris, LLC ⇒ Real Property, 100% Interest [RP]	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
LOCATION: Isle of Palms/Charleston, SC, US DESCRIPTION: Purchase of rental property					
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement CREF Global Equities [MF]	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
TIAA CREF Retirement Mutual Funds ⇒ TIAA CREF Retirement, CREF Stock Fund [MF]	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Union Bank Checking Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<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?
Stella Maris, LLC ⇒ Rental Property [RP]	JT	06/8/2021	P	\$250,001 - \$500,000	
LOCATION: Isle of Palms, SC, US					

* 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
C. Gregory Write, Inc	Spouse salary	N/A
Catholic University of America	Teaching	\$2,180.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Union Bank	July 2015	Commercial line of credit for Gloria Deo, Inc.	\$15,001 - \$50,000
SP	Union Bank	July 2015	Construction/ remodel loan for Gloria Deo, Inc.	\$15,001 - \$50,000
JT	Cornhusker Bank	June 2021	Mortgage for rental property	\$250,001 - \$500,000
JT	Cornhusker Bank	January 2021	Consolidated mortgage loan	\$100,001 - \$250,000
JT	Cornhusker Bank	March 2022	Mortgage backed loan	\$100,001 - \$250,000
Piedmont Shopping Center, LLC		February 2022	Promissory Note	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Piedmont Shopping Center, LLC
Teaching	Catholic University of America

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
March 2022	Practice Management of America, Inc. and Jeff Fortenberry	Future employment agreement starting April 4, 2022. Title: Director of Employee Programs

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
International Conservation Caucus Foundation	04/16/2021	04/19/2021	Washington, DC - Isle of Palm, South Carolina - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Mainstar Trust FBO Jeffrey Fortenberry IRA
DESCRIPTION: Stock held in self-directed IRA account
- Piedmont Shopping Center, LLC
LOCATION: Lincoln/Lancasater, NE, US
- Stella Maris, LLC (100% Interest) (Owner: JT)
LOCATION: Isle of Palms, SC, US
DESCRIPTION: Rental Property
- TIAA CREF Retirement Mutual Funds (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. Jeff Fortenberry , 07/31/2022