



Filing ID #10036948

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. William Hurd
Status: Member
State/District: TX23

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?
Mutual Funds ⇒ Alliance Bernstein [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ American Century Investments EMRG MKTS I [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mutual Funds ⇒ Carillon Family of Funds Eagle MID Cap Growth I [MF]		\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Credit Susie Floating Rate High Income I [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Devenir [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Mutual Funds ⇒ Dimensional Fund Advisors Intl Core Eqty Inst [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ iShares Trust Core S&P500 [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Mutual Funds ⇒ iShares Trust MSCI [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Legs Mason Funds Western Asset Core [MF]		None	Dividends	\$1 - \$200	<input type="checkbox"/>
Mutual Funds ⇒ MFS Funds Value I [MF]		None	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Pimco Investments Income Inst [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Pimco Investments Intl Bonds [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Primecap Odyssey Funds [MF]		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Sale of Primecap Odyssey Funds Mutual Fund.					
Mutual Funds ⇒ Principal Funds Global Real Estate [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mutual Funds ⇒ Vanguard Growth Index Admiral [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mutual Funds ⇒ Vanguard Mid Cap ETF [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mutual Funds ⇒ Vanguard Small CP ETF [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Mutual Funds ⇒ Vanguard Value Index Admiral [MF]		\$15,001 - \$50,000	Dividends	\$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?
Mutual Funds ⇒ Leg Mason Funds Western Asset Core [MF]		01/31/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Mutual Funds ⇒ MFS Funds Value I [MF]		09/27/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Mutual Funds ⇒ Primecap Odyssey Funds [MF]		09/27/2019	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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Ocwen Financial Corporation	August 2009	Mortgage for my personal residence	\$100,001 - \$250,000
	USAA	Aug 2009	Home Loan	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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?
Real Time with Bill Maher	02/1/2019	02/2/2019	Washington, DC - Los Angeles - Washington, DC	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
American Enterprise Institute	03/8/2019	03/9/2019	Washington, DC - Sea Island, GA - Washington, DC	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Aspen Institute	07/20/2019	07/21/2019	Washington, DC - Aspen, CO - Washington, DC	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aspen Cybersecurity Working Group	09/30/2019	10/1/2019	Washington, DC - White Plains, NY - Washington, DC	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- o Mutual Funds

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. William Hurd , 08/12/2020