

UNITED STATES HOUSE OF REPRESENTATIVES

2021 FINANCIAL DISCLOSURE STATEMENT

Form A

For Use by Members, Officers, and Employees

SUBMITIVE RESOURCE CENTER

(Offices Use Only)

2022

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ESTATE PLANNING

INVESTMENT

FINANCIAL PLANNING

INVESTMENT

AND DELIVERED or
11

Name: William H "Bill" Long Daytime Telephone: 202 225 6536

U.S. House of Representatives, Washington, D.C. shall be assessed against any individual who fails to file this report more than 30 days late.

FILER STATUS	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: <u>MO</u>
REPORT TYPE	<input checked="" type="checkbox"/> 2021 Annual (Due: May 16, 2022)	<input type="checkbox"/> Amendment
		<input type="checkbox"/> Termination

Staff Filer Type: (If Applicable) Shared Principal Assistant

Date of Termination: _____

PRELIMINARY INFORMATION – ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <input checked="" type="checkbox"/>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
C. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"	

IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER EACH OF THESE QUESTIONS

IPO – Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
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 that benefits you, your spouse, or dependent child?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
EXEMPTION – Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: William H "Billy" Long

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William H. Long, II
 United States House of Representatives
 Financial Disclosure Statement - Form A
 Calendar Year 2021

Schedule A - Assets and "Unearned Income"

	Asset and/or Income Source										Value of Asset	Type of Income	Amount of Income
	A	B	C	D	E	F	G	H	I	J			
Bank Accounts:													
JT BancorpSouth, Checking account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	none		
JT Springfield First Community Bank	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1 - \$ 1,000									
JT Congressional Federal Credit Union, Checking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1,000 - \$ 1,6,000		
JT Congressional Federal Credit Union, Savings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1,6,000 - \$ 6,0,000		
SP Springfield First Community Bank, Hilt Svs/ Acc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6,0,000 - \$ 10,0,000		
Mortgage Note Receivable:													
JT Kathy and Shawn Whitman, Fair Grove, MO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	none		
Oil Interest:													
JT Resource Strategies LLC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	none		
JT HRM Resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	none		
JT Finley Resources, Inc	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	none		
Stock and Securities:													
JT Fidelity Investments: 133-287448	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Royalty	x	
JT Fidelity Government Money Market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Royalty	x	
JT Fidelity Magellan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
JT Fidelity Municipal Money Market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Other Types of Income													
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	none		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1 - \$ 200		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	201 - \$ 1,000		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1,001 - \$ 2,500		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2,501 - \$ 5,000		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5,000 - \$ 15,000		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15,001 - \$ 50,000		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	50,001 - \$ 100,000		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	100,001 - \$ 1,000,000		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1,000,001 - \$ 5,000,000		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Over \$ 50,000,000		

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MetLife Insurance Co. of Connecticut
Interest Sensitive Whole Life, Cash Value

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Schedule A - Assets and "Unearned Income"

Asset and/or Income Source	Value of Asset	Type of Income
	A B C D E F G H I J K L	I II III IV V VI VII VIII IX X XI
Individual Retirement Accounts:		
Fidelity Investments: (S&P) 133-184313		
AbbyIe formerly Allegian Inc		
Borg Warner formerly Delphi Technologies Plc		
Activ Plc Com New		
Fidelity Govt Cash Reserves		
Fidelity Magellan Stock Fund		
Ampia Therapeutics LTD		
Apple Inc		
Beyond Meat		
Cdex Inc CIA		
Chesapeake Energy Corp		
Ford Motor Co		
General Electric		
Goldman Sachs Group Inc		
Graham Field Health Products Inc		
Linco, LLC Com		
Millenniu. Plastics Corp		
Nextpath Technologies Inc		
SCAC Hedges Corp New		
xxxxxx xxxxxxxx xxxx		
none		
1 - \$ 1,000		
1,001 - \$ 15,000		
15,001 - \$ 50,000		
50,001 - \$ 100,000		
100,001 - \$ 250,000		
250,001 - \$ 500,000		
500,001 - \$ 1,000,000		
1,000,001 - \$ 5,000,000		
5,000,001 - \$ 25,000,000		
25,000,001 - \$ 50,000,000		
Over \$ 50,000,000		
none		
DIVIDENDS		
RENT		
INTEREST		
CAPITAL GAINS		
EXCEPTED / BLIND TRUST		
TAX DEFERRED		
OTHER TYPES OF INCOME		
none		
1 - \$ 200		
201 - \$ 1000		
1,001 - \$ 2,500		
2,501 - \$ 5,000		
5,000 - \$ 15,000		
15,001 - \$ 50,000		
50,001 - \$ 100,000		
100,001 - \$ 1,000,000		
1,000,001 - \$ 5,000,000		
Over \$ 5,000,000		

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Schedule A - Assets and "Unearned income"

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Fidelity Investments: 414-229393

SP SP
Southern P Disney

**Wells Fargo - WM H Long (SEP IRA) WFCs as CUL
Wells Fargo Bank, NA - bank sweep
Apple Inc - split
Beyond Meat Inc**

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Schedule A - Assets and "Unearned Income"

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Schedule A - Assets and "Unearned Income"

Asset and/or Income Source	A	B	C	D	E	F	G	H	I	J	K	L	Value of Asset	Type of Income	M	N	O	P	Amount of Income
SP Wells Fargo - Barbara C Long (IRA) - 8948-6702																			
CASH Account																			
VANGUARD GRWTH INDEX ADM - VIGAS																			
VANGUARD 500 INDEX ADM - VFIAZ																			
AMER FD&S WASH MUTUAL F2 - WMFFX																			
VANGUARD HIGH DIV ADMIRAL - VHYAX																			
COLUMBIA DIV OPORTY INSTL - CDOZX																			
CENTERCOAST BRKFLD - CCCNX																			
PRINCIPAL MIDCAP - PCBIX																			
JP MORGAN US SM CO-I - JSCSX																			
VANGRD DEVELOPED MKT ADM - VTMGX																			
VIRTUS VONTobel EMG I - HIEMX																			
FEDERMEIS HERMES IS - FIHBX																			
AMER FD&S INC FUND AMR F2 - AMEFX																			
PIONEER MULT-ASSET INC Y - PMFYX																			
FRANKLIN INCOME ADV - FRIAZ																			
none																			
1 - \$ 1,000																			
1,001 - \$ 15,000																			
15,001 - \$ 50,000																			
50,001 - \$ 100,000																			
100,001 - \$ 250,000																			
250,001 - \$ 500,000																			
500,001 - \$ 1,000,000																			
1,000,001 - \$ 5,000,000																			
5,000,001 - \$ 25,000,000																			
25,000,001 - \$ 50,000,000																			
Over \$ 50,000,000																			
none																			
DIVIDENDS																			
RENT																			
INTEREST																			
CAPITAL GAINS																			
EXCEPTED / BLIND TRUST																			
TAX DEFERRED																			
OTHER TYPES OF INCOME																			
none																			
1 - \$ 200																			
201 - \$ 1000																			
1,001 - \$ 2,500																			
2,501 - \$ 5,000																			
5,000 - \$ 15,000																			
15,001 - \$ 50,000																			
50,001 - \$ 100,000																			
100,001 - \$ 250,000																			
250,001 - \$ 500,000																			
Over \$ 500,000																			

Business interests:

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Schedule A - Assets and "Unearned Income"
 Asset and/or Income Source

	A B C D E F G H I J K L	Value of Asset	Type of Income	I II III IV V VI VII VIII IX X XI	Amount of Income
	x	none			
		1 - \$ 1,000			
	x	1,001 - \$ 15,000			
		15,001 - \$ 50,000			
		50,001 - \$ 100,000			
		100,001 - \$ 250,000			
	x	250,001 - \$ 500,000			
		500,001 - \$ 1,000,000			
		1,000,001 - \$ 5,000,000			
		5,000,001 - \$ 25,000,000			
		25,000,001 - \$ 50,000,000			
		Over \$ 50,000,000			
	x	none			
	x x	DIVIDENDS			
		RENT			
		INTEREST			
		CAPITAL GAINS			
		EXCEPTED / BLIND TRUST			
		TAX DEFERRED			
		OTHER TYPES OF INCOME			
	x	none			
		1 - \$ 200			
		201 - \$ 1000			
		1,001 - \$ 2,500			
		2,501 - \$ 5,000			
		5,000 - \$ 15,000			
	x	15,001 - \$ 50,000			
		50,001 - \$ 100,000			
	x	100,001 - \$ 1,000,000			
		1,000,001 - \$ 5,000,000			
		Over \$ 50,000,000			

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SCHEDULE B — TRANSACTIONS

SPDCJ T	ASSET		Type of Transaction	Date	Amount of Transaction									
					A	B	C	D	E	F	G	H	I	J
			PURCHASE											
			SALE											
			PARTIAL SALE											
			EXCHANGE											
			Check Box If Capital Gain Exceeded \$200											
				1/12/21										
	x		\$ 1,000 1 - \$ 15,000											
			\$ 15,001 - \$ 50,000											
			\$ 50,001 - \$ 100,000											
			\$ 100,001 - \$ 250,000											
			\$ 250,001 - \$ 500,000											
			\$ 500,001 - \$ 1,000,000											
			\$ 1,000,001 - \$ 5,000,000											
			\$ 5,000,001 - \$ 25,000,000											
			\$ 25,000,001 - \$ 50,000,000											
			\$ Over \$ 50,000,000											

SCHEDULE C – EARNED INCOME

Name: William H "Billy" Long | Page 13 of 19

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. government) totaling \$200 or more during the reporting period. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000. See examples below.

EXCLUDE: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

INCOME LIMITS and PROHIBITED INCOME: The 2021 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$29,595. The 2022 limit is \$29,895. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited.

Source (include date of receipt for honoraria)

Type

Amount

Examples:

Kenne State	Approved Teaching Fee	\$6,000
State of Maryland	Legislative Per diem	\$18,000
Civil War Roundtable (Oct. 2)	Spouse Speech	\$1,000
Otsego County Board of Education	Spouse Salary	N/A

1 page attached

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Schedule C - Earned Income		
Source	Type	Amount
Keller Williams Realty, Inc.	Residual Commissions for Services Rendered Prior to House Employment	37,233
Keller Williams Realty, Inc.	Spouse Residual Commissions	28,840

SCHEDULE D – LIABILITIES

Name: William H. Bill Lowy | Page 15 of 19

Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period. Members: Members are required to report all liabilities secured by real property including mortgages on their personal residence. Exclude: Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. *Column K is for liabilities held solely by your spouse or dependent child.

SP DC, JR Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability									
			A	B	C	D	E	F	G	H	I	J
Example	First Bank of Wilmington, DE	6/20	Mortgage on Rental Property, Dover, DE	\$10,001-\$15,000								
				\$15,001-\$50,000								
				\$50,001-\$100,000								
				\$100,001-\$250,000	X							
				\$250,001-\$500,000								
				\$500,001-\$1,000,000								
				\$1,000,001-\$5,000,000								
				\$5,000,001-\$25,000,000								
				\$25,000,001-\$50,000,000								
				Over \$50,000,000								
				Over \$1,000,000* (Spouse/DC Liability)								

SCHEDULE E – POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or constituent of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature.

Position

Name of Organization

None

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Schedule D - Liabilities

Creditor	Type of Liability	Date Liability Incurred Mo/Year	Amount of Liability									
			A	B	C	D	E	F	G	H	I	J
SP, DC, JT			\$ 1 0, 0 0 1	\$ 1 5, 0, 0 0								
			\$ 1 5, 0 0 1	-	\$ 5 0, 0 0 0							
			\$ 5 0, 0 0 1	-	\$ 1 0 0, 0 0 0							
			\$ 1 0 0, 0 0 1	-	\$ 2 5 0, 0 0 0							
			\$ 2 5 0, 0 0 1	-	\$ 5 0 0, 0 0 0							
			\$ 5 0 0, 0 0 1	-	\$ 1, 0 0 0, 0 0 0							
			\$ 1, 0 0 0, 0 0 1	-	\$ 5, 0 0 0, 0 0 0							
			\$ 5, 0 0 0, 0 0 1	-	\$ 2 5, 0 0 0, 0 0 0							
			\$ 2 5, 0 0 0, 0 0 1	-	\$ 5 0, 0 0 0, 0 0 0							
			\$ O v e r		\$ 5 0, 0 0 0, 0 0 0							

SP SFC Bank, Springfield, MO
 9/9/16 Line of Credit Business Loan
 No Loans 2021
 BCL Homes

SCHEDULE F – AGREEMENTS

Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Name: William H "Bill" Long Page 17 of 19

SCHEDULE G - GIFTS

Date	Parties to Agreement	Terms of Agreement
	None	

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Report the source (by name), a brief description, and the value of all gifts totaling more than \$415 received by you, your spouse, or your dependent child from any source during the year. Exclude: Gifts from relatives, gifts of personal hospitality from an individual (which may not include a registered lobbyist or foreign agent), local meals, and gifts to a spouse or dependent child that are totally independent of his or her relationship to you. Gifts with a value of \$16 or less need not be added towards the \$415 disclosure threshold. Note: The gift rule (House Rule 25, clause 5) prohibits acceptance of gifts except as specifically provided in the rule and some gifts require prior approval of the Committee on Ethics.

Use additional sheets if more space is required.

SCHEDULE H – TRAVEL PAYMENTS and REIMBURSEMENTS

Name: William H "Billy" Lunn

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Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$415 received by you, your spouse, or your dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense. Disclosure is required regardless of whether the expenses were paid directly by the sponsor or were paid by you and reimbursed by the sponsor.

EXCLUDE: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U.S.C. § 342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to the filer.

Use additional sheets if more space is required.

**SCHEDULE I – PAYMENTS MADE TO CHARITY IN
LIEU OF HONORARIA**

List the source, activity (i.e., speech, appearance, or article), date, and amount of any payment made by the sponsor of an event to a charitable organization in lieu of paying an honorarium to you. A separate confidential list of charities receiving such payments must be filed directly with the Committee on Ethics.

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Use additional sheets if more space is required.