



Filing ID #10015214

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Walter B. Jones  
**Status:** Member  
**State/District:** NC03

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2016  
**Filing Date:** 05/10/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Balanced Fund		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Part of the "American Family of Funds"					
BB&T Corporation (BBT)		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Biokey Corporation		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: De-listed formerly publicly traded shares					
Bond Fund of America		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Part of the "American Family of Funds"					
Capitol Income Builder		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Part of the "American Family of Funds"					
Europacific Growth Fund		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Part of the "American Family of Funds"					
Express Scripts Holding Company (ESRX)		\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fundamental Investors Fund		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Part of the "American Family of Funds"					
Growth Fund of America		\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: Part of the "American Family of Funds"					
Income Fund of America		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Part of the "American Family of Funds"					
Investment Company of America		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Part of the "American Family of Funds"					
Investors Title Company (ITIC)		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Legislative Pension, NC		Undetermined	See Schedule C	Not Applicable	<input type="checkbox"/>
Nucor Corporation (NUE)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Raymond James Traditional IRA ⇒ Altria Group, Inc. (MO)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Raymond James Traditional IRA ⇒ BB&T Corporation (BBT)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Raymond James Traditional IRA ⇒ Mondelez International, Inc. - Class A (MDLZ)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Raymond James Traditional IRA ⇒ Philip Morris International Inc (PM)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Raymond James Traditional IRA ⇒ The Kraft Heinz Company (KHC)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Solarbrook Corporation		None	None		<input type="checkbox"/>
DESCRIPTION: De-listed formerly publicly traded shares					
Washington Mutual Investors		\$1 - \$1,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Part of the "American Family of Funds"					

\* Asset class details available at the bottom of this form.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Growth Fund of America		12/22/2016	P	\$1,001 - \$15,000	
DESCRIPTION: Reinvestment of annual capital gain distribution. Growth Fund of America is part of the "American Family of Funds".					

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Raymond James Traditional IRA	Required Minimum Distribution	\$1,075.08
State of NC	Legislative Pension	\$3,408.15

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	First South Bank	December 2011	Mortgage on Farmville, NC home	\$50,001 - \$100,000
	Carolina Premier Bank	September 2012	Mortgage on Alexandria, VA condominium	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Directors	East Carolina Vocational Center

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.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Raymond James Traditional 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. Walter B. Jones , 05/10/2017