



Filing ID #10018535

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Terri A. Sewell  
**Status:** Member  
**State/District:** AL07

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2016  
**Filing Date:** 08/13/2017

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cisco Systems, Inc. (CSCO)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Coach, Inc. (COH)		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
General Electric Company (GE)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
MCG 401k ⇒ American Funds Europacific-R4		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: On 7/26/16, all assets in MCG 401k were sold and funds transferred/rollover into federal retirement account (TSP)					
MCG 401k ⇒ Eagle Mid Cap Growth-A		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: On 7/26/16, all assets in MCG 401k were sold and funds transferred/rollover into federal retirement account (TSP)					
MCG 401k ⇒ Invesco Growth & Income Fund -A		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: On 7/26/16, all assets in MCG 401k were sold and funds transferred/rollover into federal retirement account (TSP)					
MCG 401k ⇒ Victory Small Co. Opportunity-A		None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: On 7/26/16, all assets in MCG 401k were sold and funds transferred/rollover into federal retirement account (TSP)					
MCG 401k ⇒ Wells Fargo Stable Principal Fund		None	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: On 7/26/16, all assets in MCG 401k were sold and funds transferred/rollover into federal retirement account (TSP)					
Merrill Lynch IRA ⇒ Amer Funds Amcap		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Merrill Lynch IRA ⇒ Amer Funds Washington		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Merrill Lynch IRA ⇒ American Euro Pacific		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Merrill Lynch IRA ⇒ American Growth Fund		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Merrill Lynch IRA ⇒ American Investment Co.		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Merrill Lynch IRA ⇒ Columbia Large Cap		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: On 11/1/16, Exchange Redemption of Columbia Marsico Growth and Exchange Purchase of Columbia Large Cap					
Merrill Lynch IRA ⇒ Eaton Vance Income Fund		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Merrill Lynch IRA ⇒ Money Mkt Fund Rsrvs CL1		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Merrill Lynch IRA ⇒ Wells Fargo Advantage		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo Acct		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>

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

## SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
MCG 401k ⇒ American Funds Europacific-R4		07/26/2016	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: On 7/26/16, all assets in MCG 401k were sold and funds transferred/rollover into federal retirement account (TSP)					
MCG 401k ⇒ Eagle Mid Cap Growth-A		07/26/2016	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: On 7/26/16, all assets in MCG 401k were sold and funds transferred/rollover into federal retirement account (TSP)					
MCG 401k ⇒ Invesco Growth & Income Fund -A		07/26/2016	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: On 7/26/16, all assets in MCG 401k were sold and funds transferred/rollover into federal retirement account (TSP)					
MCG 401k ⇒ Victory Small Co. Opportunity-A		07/26/2016	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: On 7/26/16, all assets in MCG 401k were sold and funds transferred/rollover into federal retirement account (TSP)					
MCG 401k ⇒ Wells Fargo Stable Principal Fund		07/26/2016	S	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: On 7/26/16, all assets in MCG 401k were sold and funds transferred/rollover into federal retirement account (TSP)					

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

**SCHEDULE C: EARNED INCOME**

None disclosed.

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Regions Bank	January 2013	Personal Loan	\$8,500.00
COMMENTS: Debt reduced to under \$10,000 during this reporting period				
	Regions Bank	2009	Personal Loan	\$50,001 - \$100,000
COMMENTS: On 10/26/16 loan was paid off				
	Regions Bank	2009	Personal Loan	\$50,001 - \$100,000
COMMENTS: On 10/26/16 loan was paid off				
	Regions Bank	December 2005	Mortgage on Personal Residence Birmingham, AL	\$250,001 - \$500,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Citibank	December 2016	Credit Card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member (uncompensated)	Congressional Black Caucus Foundation

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?
Trumpet Award Foundation	01/22/2016	01/24/2016	Birmingham, AL - Atlanta, GA - Birmingham, AL	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
MLK Freedom Center	05/13/2016	05/15/2016	Washington, DC - Oakland, CA - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>◦ MCG 401k</li><li>◦ Merrill Lynch IRA</li></ul>
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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. Terri A. Sewell , 08/13/2017