Filing ID #10027664

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: Amendment Report
Filing Year: 2015
Filing Date: 05/14/2019

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Mutual Funds ⇒ American Century Heritage [MF] Description: Held by LPL Financial		$1,001 - $15,000	Capital Gains	None	
Mutual Funds ⇒ American Century Heritage [MF]		$1,001 - $15,000	Tax-Deferred		
Mutual Funds ⇒ Artisan Mid Cap Value [MF] Description: Held by LPL Financial		$1,001 - $15,000	Capital Gains	$201 - $1,000	
Mutual Funds ⇒ Artisan Mid-Cap [MF] Description: Owned by LPL Financial		$1,001 - $15,000	Tax-Deferred		
Mutual Funds ⇒ Devenir [IH]		$1,001 - $15,000	Tax-Deferred		
Mutual Funds ⇒ Franklin Rising [MF] Description: Held by LPL Financial		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Mutual Funds ⇒ Franklin Rising Dividends [MF] Description: Held by LPL Financial		$1,001 - $15,000	Dividends	$201 - $1,000	
Mutual Funds ⇒ Ivy Asset Strat [MF] Description: Held by LPL Financial		$1,001 - $15,000	Dividends	$201 - $1,000	
Mutual Funds ⇒ Ivy Asset Strat [MF] Description: Held by LPL Financial		$1,001 - $15,000	Tax-Deferred		
Mutual Funds ⇒ Oppenheimer Developing Markets [MF] Description: Held by LPL Financial		$1,001 - $15,000	Tax-Deferred		
Mutual Funds ⇒ Oppenheimer Developing Markets [MF] Description: Held by LPL Financial		$1,001 - $15,000	Capital Gains	$201 - $1,000	
Mutual Funds ⇒ Royce Dividend Value [MF] Description: Held by LPL Financial		$1,001 - $15,000	Dividends	$201 - $1,000	
Mutual Funds ⇒ Royce Dividend Value [MF] Description: Held by LPL Financial		$1,001 - $15,000	Tax-Deferred		
Mutual Funds ⇒ Thornburg Income Builder [MF] Description: Held by LPL Financial		$1,001 - $15,000	Dividends	$201 - $1,000	
Mutual Funds ⇒ Thornburg Income Builder IRA [MF]		$1,001 - $15,000	Tax-Deferred		
Mutual Funds ⇒ US Global Investors Global Resources [MF] Description: Held by LPL Financial		$1,001 - $15,000	Dividends	$1 - $200	
Mutual Funds ⇒ US Global Investors Global Resources IRA [MF] Description: Held at LPL Financial		$1,001 - $15,000	Tax-Deferred		

* 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

None disclosed.

Schedule C: Earned Income

None disclosed.

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	GMAC Mortgage	Aug 2009	This is mortgage for personal residence	$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

None disclosed.

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Asset Class Details

- 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 , 05/14/2019