Filing ID #10021972

Financial Disclosure Report

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Filer Information

Name: Hon. Marsha Blackburn
Status: Member
State/District: TN07

Filing Information

Filing Type: Annual Report
Filing Year: 2017
Filing Date: 08/3/2018

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
American Funds IRA ⇒ American Balanced Fund CI-A [MF]		$1,001 - $15,000	None		
American Funds IRA ⇒ Investment Company of America [MF]		$1,001 - $15,000	None		
American Funds IRA ⇒ New Perspective Fund [MF]		$50,001 - $100,000	None		
Capital Bank, Nashville, TN [BA]		$15,001 - $50,000	Interest	$1 - $200	
Capital Bank, Nashville, TN [BA]	SP	$15,001 - $50,000	Interest	$1 - $200	
MetLife IRA ⇒ Bernstein Global Dynamic Allocation Portfolio [MF]	SP	$1,001 - $15,000	None		
MetLife IRA ⇒ Blackrock Global Tactical Strartegies Portfolio [MF]	SP	$15,001 - $50,000	None		
MetLife IRA ⇒ Invesco Balanced Risk Allocation Formula [MF]	SP	$1,001 - $15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
MetLife IRA ⇒ JP Morgan Active Allocation Portfolio [MF]	SP	$15,001 - $50,000	None		
MetLife IRA ⇒ MetLife Balanced Plus Portfolio [MF]	SP	$1,001 - $15,000	None		
MetLife IRA ⇒ Schroeders Global Multi-Asset Portfolio [MF]	SP	$15,001 - $50,000	None		
Principal Annuity IRA ⇒ Balanced Asset Allocation Diversified Inc. [AB]	SP	$50,001 - $100,000	None		
Principal Annuity IRA ⇒ Balanced Asset Allocation Diversified Inc. [AB]		$50,001 - $100,000	None		
State of Tennessee Legislator's Pension [PE]		Undetermined	None		
Strategic Sales Tactics, Inc, 100% Interest [OL] Location: Brentwood, TN, US Description: Business Consultants	SP	$15,001 - $50,000	None		

* 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

Source	Type	Amount
State of Tennessee	Legislative Pension	$4,571.00
Strategic Sales Tactics, Brentwood, TN	Consulting Income - Spouse	N/A
Charles Blackburn, Sales Consultant, Brentwood, TN	Sales Commission Income - Spouse	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Wells Fargo Bank	December 2010	Mortgage on personal residence	$250,001 - $500,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Capital Bank	February 2008	Mortgage on personal residence	$50,001 - $100,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
February 2002	State of Tennessee	Legislative Pension

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

- American Funds IRA
- MetLife IRA (Owner: SP)
- Principal Annuity IRA
- Principal Annuity IRA (Owner: SP)

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. Marsha Blackburn , 08/3/2018