Filing ID #10026447

Financial Disclosure Report

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Filer Information

Name: Hon. Adrian Smith
Status: Member
State/District: NE03

Filing Information

Filing Type: Annual Report
Filing Year: 2018
Filing Date: 05/13/2019

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Bank of America Checking Account [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	☐
Miller Lake Corporation Location: Laramie, WY [PS]		$15,001 - $50,000	None		☐
Description: Private stock (1/8 ownership interest: corporation composed of commonly owned land - Laramie, WY)					
My Other Garage (storage business) [OL]		$100,001 - $250,000	Rent	$5,001 - $15,000	☐
Location: Gering/Scotts Bluff, NE, US Description: Owner of storage units. Income in the form of rent.					
Nebraska Teacher Retirement [PE]		$1,001 - $15,000	Interest	$1 - $200	☐
NEST 529- Income Fund of America CL A [5P]	DC	$1,001 - $15,000	Mutual Fund/ Investment	None	☐
Location: NE Description: Ezekiel's college savings					
Platte Valley Bank Savings Account [BA]		$1,001 - $15,000	Interest	$1 - $200	☑
Prin LifeTime Hybrid 2040 CiT [MF]	SP	$15,001 - $50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Description: spouse 401k plan (CarterBaldwin)					
State Farm Roth IRA - State Farm Mutual Funds Bond Fund [IH]		$1,001 - $15,000	None		☐
State Farm Roth IRA - State Farm Mutual Funds International Index [IH]		$1,001 - $15,000	None		☐
State Farm Roth IRA - State Farm Mutual Funds Large Cap Index [IH]		$15,001 - $50,000	Interest	$1,001 - $2,500	☐
State Farm Roth IRA - State Farm Mutual Funds Small Cap Index [IH]		$1,001 - $15,000	Interest	$1,001 - $2,500	☐
State Farm TSA - Bloomington IL [FN]		$1,001 - $15,000	Interest	$201 - $1,000	☐
State Farm Universal Life Insurance [WU]		$1,001 - $15,000	Interest	$1,001 - $2,500	☐
TIAA-CREF: The Aspen Institute Deferred Annuity Plan [MF] Description: Defined by the IRS as 403 B retirement contracts; this is one account/asset	SP	$1,001 - $15,000	Tax-Deferred		☐
Western Heritage Credit Union (Savings and Checking) [BA]		$1,001 - $15,000	Interest	$1 - $200	☐
Western States Bank(Gering, NE) (Checking) [BA]		$100,001 - $250,000	Interest	None	☐

* For the complete list of asset type abbreviations, please visit https://fd.house.gov/reference/asset-type-codes.aspx.

Schedule B: Transactions

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
NEST 529- Income Fund of America CL A [5P] Location: NE Description: Ezekiel's college savings	SP	12/31/2018	P	$1,001 - $15,000	
Platte Valley Bank Savings Account [BA] Description: Savings Account		05/25/2018	P	$1,001 - $15,000	

* For the complete list of asset type abbreviations, please visit https://fd.house.gov/reference/asset-type-codes.aspx.

Schedule C: Earned Income

Source	Type	Amount
CarterBaldwin	spouse salary	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo	October 2018	mortgage	$500,001 - $1,000,000

Schedule E: Positions

Position	Name of Organization
Board Member	Leadership Institute's Congressional Advisory Board
Board Member	ThankUSA's Congressional Advisory Board
Board Member	U.S. Coast Guard Board of Visitors

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.

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

[x] 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. Adrian Smith , 05/13/2019