Filing ID #10026863

Financial Disclosure Report

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

Filer Information

Name: Hon. Marc A. Veasey
Status: Member
State/District: TX33

Filing Information

Filing Type: Annual Report
Filing Year: 2018
Filing Date: 07/10/2019

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Castleview Drive Mineral Rights [RP] Location: Fort Worth, TX, US Description: Mineral royalty.	SP	$1 - $1,000	Royalty	$1 - $200	☐
Edward Jones 529 College Savings Plan ⇒ Capital World Growth (CWGIX) [5P] Location: TX	JT	$1,001 - $15,000	Tax-Deferred		☐
Edward Jones 529 College Savings Plan ⇒ New Economy Fund CL A (ANEFX) [MF]	JT	$1,001 - $15,000	Tax-Deferred		☐
Edward Jones 529 College Savings Plan ⇒ New Perspective Fund (ANWPX) [5P] Location: TX	JT	$1,001 - $15,000	Tax-Deferred		☐
LPL Financial Roth IRA ⇒ Citibank NA [IH]		$15,001 - $50,000	Tax-Deferred		☐
Parkwood Drive Mineral Rights [RP] Location: Fort Worth, TX, US	SP	$1,001 - $15,000	Royalty	$201 - $1,000	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Texas Employees Retirement System Plan [DB]		$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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
LPL Financial Retirement Account ⇒ Invesco Balanced-Risk Allocation Fund (ABRZX) [MF]	SP	07/10/2018	S	$1,001 - $15,000	☐
Open Channel Group 401K Plan ⇒ Blackrock GNMA (BBGPX) [MF]	SP	12/3/2018	S	$15,001 - $50,000	☐
Open Channel Group 401K Plan ⇒ Vanguard S&P (VOO) [MF]	SP	12/3/2018	S	$50,001 - $100,000	☐
Open Channel Group 401K Plan ⇒ Vanguard TD (VTINX) [MF]	SP	12/3/2018	S	$15,001 - $50,000	☐

* 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 C: Earned Income

Source	Type	Amount
Open Channels Group	Spouse Salary	N/A
Open Channels Group	Spouse 401(k) Distribution	N/A
LPL Financial Retirement	Spouse IRA Distribution	N/A
Key Construction	Spouse Consulting	N/A
Fort Worth Arena	Spouse Consulting	N/A

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Compass Bank	March 2012	Mortgage on home in Ft. Worth, TX	$100,001 - $250,000
SP	Citibank	December 2018	Credit Card	$15,001 - $50,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Compass Bank	March 2012	Line of Credit	$50,001 - $100,000
JT	Compass Bank	December 2018	Credit Card	$15,001 - $50,000
JT	Compass Bank	December 2018	Home Equity Line of Credit	$50,001 - $100,000
	Congressional Federal Credit Union	July 2018	Personal Loan	$10,000 - $15,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
January 2005	Myself & State of Texas	Pension annuity for service in state legislature.

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

- Edward Jones 529 College Savings Plan (Owner: JT)
  Location: TX
- LPL Financial Retirement Account (Owner: SP)
- LPL Financial Roth IRA
- Open Channel Group 401K Plan (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. Marc A. Veasey , 07/10/2019