



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Michael C. Burgess  
**Status:** Member  
**State/District:** TX26

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 08/9/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
2112 Blackjack Road, Pilot Point [RP]  LOCATION: Pilot Point, TX, US DESCRIPTION: formerly listed as 30 acres 2000 Blackjack, Aubrey, TX	JT	\$500,001 - \$1,000,000	Farming income	None	<input type="checkbox"/>
4637 Ivanhoe Dr., Fort Worth, TX [RP]  LOCATION: Fort Worth, TX, US	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
American Airlines Group, Inc. (AAL) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Brighthouse Financial, Inc. (BHF) [ST]  DESCRIPTION: Brighthouse Financial Inc is a spinoff from the Metlife Inc. Amount is less than the reporting threshold.	SP	\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Compass Bank [BA]  DESCRIPTION: non-interest paying checking account. As of 2020 account is still open however no asset.	JT	None	None		<input type="checkbox"/>
Dale Operating Gas Lease [RP]  LOCATION: multiple counties, TX, US		None	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
E Trade (Formerly Capital One Investing Cash Balance) [BA]	SP	None	Dividends	None	<input type="checkbox"/>
DESCRIPTION: 2020 name change. Zero assets in account however account is still open.					
Fidelity Capital Appreciation [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Cash Reserves [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Contrafund [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
iShares MSCI Austria Capped Investable Market Index Fund (EWO) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
L Brands, Inc. (LB) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
MetLife, Inc. (MET) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1987-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1988-whole [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1989-whole [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991b-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-90 Life 1997-whole [WU]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual Life Ins Co [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Note Receivable 1: Wise Co Prop, Lewisville, TX [DO]		None	None		<input type="checkbox"/>
DESCRIPTION: note receivable decreased in value due to bankruptcy of the debtor, no payments received					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Obsidian Energy Ltd. (OBE) [ST] DESCRIPTION: formerly PENN WEST PETROLEUM LTD		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
OPKO Health Inc. (OPK) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Point Bank [OT] DESCRIPTION: checking account	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Southwest Airlines Company (LUV) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Fidelity Adv. Series - Equity Growth Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Pfizer, Inc. (PFE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Stryker Corporation (SYK) [ST]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Viatrix Inc. (VTRS) [ST] DESCRIPTION: Spinoff from Pfizer, no cost purchase. Listed as a Purchase on Schedule B.11/16/2020	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
TD Ameritrade Insured Deposit [BA] DESCRIPTION: Money Market		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Titan Operating Gas Lease [RP] LOCATION: multiple counties, TX, US		None	None		<input type="checkbox"/>
Toyota Motor Corporation (TM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vantage Energy Operating Gas Lease [RP] LOCATION: multiple counties, TX, US	JT	None	royalty income	None	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Wells Fargo Bank Deposit Sweep Combined [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo IRA ⇒ Abbott Laboratories (ABT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ AbbVie Inc. (ABBV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Cigna Corporation (CI) [ST] DESCRIPTION: Cigna merged with Express Scripts		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Ford Motor Company (F) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ General Electric Company (GE) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ International Business Machines Corporation (IBM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ iShares TIPS Bond ETF (TIP) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Nokia Corporation Sponsored American Depository Shares (NOK) [ST]					
Wells Fargo IRA ⇒ Obsidian Energy Ltd. (OBE) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: formerly Penn West Petroleum LTD					
Wells Fargo IRA ⇒ Southwest Airlines Company (LUV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Stryker Corporation (SYK) [ST]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Texas Instruments Incorporated (TXN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Walt Disney Company (DIS) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wright Patterson Congressional Credit Union [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>

\* 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?
Spouse's Wells Fargo IRA ⇒ Viatrix Inc. (VTRS) [ST]	SP	11/16/2020	P	\$ .00	
DESCRIPTION: Amount of transaction \$0.00. Spinoff from Pfizer. No Cost.					

\* 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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	AmeriHome Mortgage Co	03/21/2018	mortgage on Blackjack Road	\$250,001 - \$500,000
JT	Pennymac Loan Services LLC	06/17/2019	mortgage on 11 Jaca Place	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Member of the Board	University of North Texas Foundation
Honorary Co-Chairman	Alliance for Health Policy

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2010	Self / World Net Daily	Publishing Contract

## 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

- o Spouse's Wells Fargo IRA (Owner: SP)
- o Wells Fargo IRA

## 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. Michael C. Burgess , 08/9/2021