



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Patty Pansing Brooks
Status: Congressional Candidate
State/District: NE01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 03/10/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Funds [MF] DESCRIPTION: 303.606 shares of New Perspective Fund A held in American Funds Account	SP	\$15,001 - \$50,000	Tax-Deferred		
Assurity Life Insurance [WU] DESCRIPTION: Whole life insurance policy with child as insured.	JT	\$15,001 - \$50,000	None		
Assurity Life Insurance [WU] DESCRIPTION: Whole life insurance policy with child as insured.	JT	\$1,001 - \$15,000	None		
Brooks, Pansing Brooks, PC, LLO, 100% Interest [OL] LOCATION: Lincoln, NE, US DESCRIPTION: Law firm providing legal services to individuals, families and companies in matters including telecommunications, business law, estate planning and probate, real estate and other transaction-based matters.	JT	Undetermined	None		
Condo 507 [RP] LOCATION: Lincoln, NE, US DESCRIPTION: Residential Condominium Property COMMENTS: The Residential Condominium Property is not currently producing income.	JT	\$250,001 - \$500,000	None		
Condo 903 [RP]	JT	\$100,001 -	Rent	None	\$5,001 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
		\$250,000			\$15,000
<p>LOCATION: Lincoln, NE, US</p> <p>DESCRIPTION: Monthly rent from Residential Condominium Property tenants for the period of January-August, 2021.</p> <p>COMMENTS: The previous renter vacated the premises at the end of August, 2021 and the property has not been leased since then. The property is not currently producing income and is currently on the market seeking a buyer.</p>					
LPL Financial [MF]	JT	\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: One (1) share of Berkshire Hathaway, Inc. Class A held in LPL Financial Investment Account					
LPL Financial [MF]	JT	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Four Hundred (400) shares of Berkshire Hathaway, Inc. Class B New shares held in LPL Financial Account					
Merrill Lynch IRA [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Bank of America, NA RASP Cash/Money Account held in Merrill Lynch IRA Account					
Merrill Lynch IRA [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 0.1190 shares of American Investment Co Mutual Funds held in Merrill Lynch IRA Account					
Merrill Lynch IRA [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: 0.7410 shares of American New Perspective Mutual Fund held in Merrill Lynch IRA Account					
Merrill Lynch IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Bank of America, NA RASP Cash/Money Account held in Merrill Lynch IRA Account					
Merrill Lynch IRA [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 90.5920 shares of American Mutual Fund held in Merrill Lynch IRA Account					
Merrill Lynch IRA [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 110.5410 shares of Nuveen Winslow Large Cap Mutual Fund held in Merrill Lynch IRA Account					
Merrill Lynch SEP [IH]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Bank of America, NA RASP Cash/Money Account held in Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 30.1100 shares of American Growth Mutual Fund held in Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 221.9410 shares of North Square Oak Ridge Mutual Fund held in Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 95.3140 shares of Thornburg Global Mutual Fund held in Merrill Lynch SEP Account					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch SEP [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 112.7590 shares held in Thornburg International Mutual Fund held in Merrill Lynch SEP Account.					
Merrill Lynch SEP [BA]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Bank of America, NA RASPCash/Money Account held by Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: 2,506.6360 shares of American Mutual Fund held by Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: 2,190.8710 shares of American Growth Mutual Fund held by Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: 2,471.2490 shares of American Inc. FD of Amer Mutual Fund held in Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: 1,504.5490 shares of Carillon Eagle Mid Cap Mutual Fund held in Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: 1,967.9640 shares of Diamond Hill Small Cap Mutual Fund held by Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: 3,394.4920 shares of Loomis Sayles Strategic Mutual Fund held in Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: 2,814.6400 shares of North Square Oak Ridge Mutual Fund held in Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: 122.4670 shares of Thornburg Income Builder Mutual Fund held in Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: 1,414.2210 shares of Thornburg Global Mutual Fund held in Merrill Lynch SEP Account					
Merrill Lynch SEP [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: 3,069.0260 shares of Thornburg International Mutual Fund held in Merrill Lynch SEP Account					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Naussau RE [WU] DESCRIPTION: Whole life insurance policy with child as insured.	JT	\$1,001 - \$15,000	None		
Principal Life Insurance [WU] DESCRIPTION: Universal Life Protector III policy	SP	\$50,001 - \$100,000	None		
Principal Life Insurance [WU] DESCRIPTION: Universal Life Protector III		\$1,001 - \$15,000	None		
Principal Life Insurance [WU] DESCRIPTION: Universal Life Protector IV	SP	\$1,001 - \$15,000	None		
Universal Broadband Consulting, Inc., 50% Interest [OL] LOCATION: Lincoln, NE, US DESCRIPTION: Cash dividend in privately held benefit corporation.	SP	\$100,001 - \$250,000	Dividends	None	\$50,001 - \$100,000
Universal Broadband Consulting, Inc., 50% Interest [OL] LOCATION: Lincoln, NE, US DESCRIPTION: Mutual benefit company offering broadband consulting services to municipalities, utilities and agricultural entities.	SP	\$250,001 - \$500,000	None		
Weitz Investment Management [MF] DESCRIPTION: 3,551.746 shares of Partners III Opportunity Multi-Cap stock held in Weitz Account		\$50,001 - \$100,000	Tax-Deferred		
Weitz Investment Management [MF] DESCRIPTION: 2,311.346 shares of Ultra Short Government Fund held in Weitz Investment Account		\$15,001 - \$50,000	Tax-Deferred		

* 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 Current Year to Filing	Amount Preceding Year
Brooks, Pansing Brooks, PC, LLO	Salary	\$7,500.00	\$45,000.00
State of Nebraska/Dept of Administrative Services	Salary	\$2,000.00	\$12,000.00
Brooks, Pansing Brooks, PC, LLO	Spouse's Salary	\$34,166.65	\$205,000.05
Universal Broadband Consulting, Inc.	Spouse's Salary		\$30,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Pinnacle Bank	2021	Credit Card Balance	\$15,001 - \$50,000
JT	Pinnacle Bank	May 17, 2018	Installment Fixed Loan	\$50,001 - \$100,000
JT	Pinnacle Bank	May 17, 2018	Real Estate Fixed Loan	\$100,001 - \$250,000
JT	Pinnacle Bank	July 9, 2012	Real Estate Fixed Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Lincoln Community Foundation COMMENTS: Nonprofit organization in Lincoln, Nebraska.
Trustee	Mourning Hope COMMENTS: Nonprofit organization in Lincoln, Nebraska.
Trustee	Lincoln Public Schools Foundation COMMENTS: Nonprofit organization in Lincoln, Nebraska.
Trustee	Lincoln Parks Foundation COMMENTS: A nonprofit organization in Lincoln, Nebraska.
Trustee	Bryan Medical Center COMMENTS: Medical facility in Lincoln, NE. Candidate no longer holds the position of Trustee.
Vice President	Brooks, Pansing Brooks, PC, LLO COMMENTS: Law firm offering legal services in Lincoln, NE.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Patty Pansing Brooks , 03/10/2022