Filing ID #10047528

Financial Disclosure Report

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Filer Information

Name: Hon. Theodore P. Budd
Status: Member
State/District: NC13

Filing Information

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 08/12/2022

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
2017 IRRV TR FBO 1 ⇒ Emerging Markets S [MF]	DC	None	Capital Gains	$201 - $1,000	✓
2017 IRRV TR FBO 1 ⇒ Fidelity Inflat-Prof BD Index Fund [MF]	DC	$15,001 - $50,000	Dividends	$201 - $1,000	✓
2017 IRRV TR FBO 1 ⇒ Russell Tax-Managed Real Assets CL S [MF]	DC	$1,001 - $15,000	Dividends	$1 - $200	
2017 IRRV TR FBO 1 ⇒ Tax Exempt Bond Fund Class S [MF]	DC	$15,001 - $50,000	Capital Gains, Dividends	$1,001 - $2,500	✓
2017 IRRV TR FBO 1 ⇒ Tax Exempt High Yield Bond S [MF]	DC	$1,001 - $15,000	Dividends	$1 - $200	✓
2017 IRRV TR FBO 1 ⇒ Tax Managed International Equity S [MF]	DC	$15,001 - $50,000	Dividends	$201 - $1,000	
2017 IRRV TR FBO 1 ⇒ Tax Managed US Large Cap Fund CL [MF]	DC	$15,001 - $50,000	Dividends	$1 - $200	
2017 IRRV TR FBO 1 ⇒ Tax Managed US Mid & Small CP S [MF]	DC	$1,001 - $15,000	Dividends	$1 - $200	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
2017 IRRV TR FBO 2 ⇒ Emerging Markets S [MF]	DC	None	Capital Gains	$201 - $1,000	☑
2017 IRRV TR FBO 2 ⇒ Fidelity Inflat-Prot BD Index Fund [MF]	DC	$15,001 - $50,000	Dividends	$201 - $1,000	☑
2017 IRRV TR FBO 2 ⇒ Russell Tax-Managed Real Assets CL S [MF]	DC	$1,001 - $15,000	Dividends	$201 - $1,000	☐
2017 IRRV TR FBO 2 ⇒ Tax Exempt Bond Fund Class S [MF]	DC	$15,001 - $50,000	Capital Gains, Dividends	$1,001 - $2,500	☑
2017 IRRV TR FBO 2 ⇒ Tax Exempt High Yield Bond S [MF]	DC	$1,001 - $15,000	Dividends	$1 - $200	☑
2017 IRRV TR FBO 2 ⇒ Tax Managed International Equity S [MF]	DC	$15,001 - $50,000	Dividends	$201 - $1,000	☐
2017 IRRV TR FBO 2 ⇒ Tax Managed US Large Cap Fund CL [MF]	DC	$15,001 - $50,000	Dividends	$1 - $200	☐
2017 IRRV TR FBO 2 ⇒ Tax Managed US Mid & Small CP S [MF]	DC	$1,001 - $15,000	Dividends	$1 - $200	☐
2017 IRRV TR FBO 3 ⇒ Emerging Markets S [MF]	DC	None	Capital Gains	$201 - $1,000	☑
2017 IRRV TR FBO 3 ⇒ Fidelity Inflat-Prot BD Index Fund [MF]	DC	$15,001 - $50,000	Dividends	$201 - $1,000	☑
2017 IRRV TR FBO 3 ⇒ Russell Tax-Managed Real Assets CL S [MF]	DC	$1,001 - $15,000	Dividends	$1 - $200	☐
2017 IRRV TR FBO 3 ⇒ Tax Exempt Bond Fund Class S [MF]	DC	$15,001 - $50,000	Capital Gains, Dividends	$1,001 - $2,500	☑
2017 IRRV TR FBO 3 ⇒ Tax Exempt High Yield Bond S [MF]	DC	$1,001 - $15,000	Dividends	$1 - $200	☑
2017 IRRV TR FBO 3 ⇒ Tax Managed International Equity S [MF]	DC	$15,001 - $50,000	Dividends	$201 - $1,000	☐
2017 IRRV TR FBO 3 ⇒	DC	$15,001 - $50,000	Dividends	$1 - $200	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Tax Managed US Large Cap Fund CL S [MF]					
2017 IRRV TR FBO 3 ⇒ Tax Managed US Mid & Small CP S [MF]	DC	$1,001 - $15,000	Dividends	$1 - $200	
AKB - ROTH IRA ⇒ Emerging Markets S [MF]	SP	$1,001 - $15,000	Tax-Deferred		✓
AKB - ROTH IRA ⇒ Global Infrastructure CL S [MF]	SP	$1,001 - $15,000	Tax-Deferred		✓
AKB - ROTH IRA ⇒ Global Real Estate Securities S [MF]	SP	None	Tax-Deferred		✓
AKB - ROTH IRA ⇒ International Developed Mrkt CL S [MF]	SP	$15,001 - $50,000	Tax-Deferred		
AKB - ROTH IRA ⇒ Invesco Equally Weighted S&P 500 [MF]	SP	$15,001 - $50,000	Tax-Deferred		✓
AKB - ROTH IRA ⇒ Ishares TR Residential ETF [EF]	SP	$1,001 - $15,000	Tax-Deferred		✓
AKB - ROTH IRA ⇒ Opportunistic Credit Fund S [MF]	SP	$1 - $1,000	Tax-Deferred		✓
AKB - ROTH IRA ⇒ US Small Cap Equity Class S [MF]	SP	$1,001 - $15,000	Tax-Deferred		
AKB - ROTH IRA ⇒ Van Eck CM Commodity Index Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		✓
AKB Individual TOD 18 ⇒ Dimensional ETF Trust US Equity [EF]	SP	$15,001 - $50,000	Dividends	$1 - $200	✓
AKB Individual TOD 18 ⇒ Dimensional ETF Trust World EX US [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
AKB Individual TOD 18 ⇒ Russell Tax-Managed Real Assets CL S [MF] DESCRIPTION: Includes transfer from AKB Individual TOD 96.	SP	$15,001 - $50,000	Dividends	$201 - $1,000	
AKB Individual TOD 18 ⇒ Tax Exempt High Yield Bond S [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	✓

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Description: Includes transfer from AKB Individual TOD 96.					
AKB Individual TOD 18 ⇒ Tax Managed International Equity S [MF]	SP	$50,001 - $100,000	Dividends	$1,001 - $2,500	✓
Description: Includes transfer from AKB Individual TOD 96.					
AKB Individual TOD 18 ⇒ Tax Managed US Large Cap Fund CL [MF]	SP	$50,001 - $100,000	Dividends	$1 - $200	
Description: Net of transfer to charitable organization. Also net of transfer to AKB Individual TOD 96.					
AKB Individual TOD 18 ⇒ Tax Managed US Mid & Small CP S [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	✓
Description: Includes transfer from AKB Individual TOD 96.					
AKB Individual TOD 96 ⇒ DFA Tax Managed US Equity Portfolio [MF]	SP	None	Capital Gains	$201 - $1,000	✓
AKB Individual TOD 96 ⇒ Dimensional ETF Trust US Equity [EF]	SP	$1,001 - $15,000	Dividends	$1 - $200	✓
AKB Individual TOD 96 ⇒ Dimensional ETF Trust US Small Cap [EF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	✓
AKB Individual TOD 96 ⇒ Russell Tax-Managed Real Assets CL S [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$2,501 - $5,000	✓
Description: Net of transfer to charitable organization. Also net of transfer to AKB Individual TOD 18.					
AKB Individual TOD 96 ⇒ Tax Exempt High Yield Bond S [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	✓
Description: Net of transfer to Individual TOD 18.					
AKB Individual TOD 96 ⇒ Tax Managed International Equity S [MF]	SP	$15,001 - $50,000	Capital Gains, Dividends	$5,001 - $15,000	✓
Description: Net of transfer to Individual TOD 18.					
AKB Individual TOD 96 ⇒ Tax Managed US Large Cap Fund CL [MF]	SP	$15,001 - $50,000	Capital Gains, Dividends	$5,001 - $15,000	✓
Description: Net of transfer to charitable to charitable organization. Also includes transfer from Individual TOD 18.					
AKB Individual TOD 96 ⇒ Tax Managed US Mid & Small CP S [MF]	SP	None	Capital Gains	$2,501 - $5,000	✓
Description: Net of transfer to charitable organization. Also net of transfer to AKB Individual TOD 18.					
Budd Family LLC (1) ⇒ Budd Family LLC [FA]	DC	$250,001 - $500,000	Rent	$2,501 - $5,000	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Location: Advance/Davie County, NC, US Description: Net activity was a loss. Cattle farm.					
Budd Family LLC (1) ⇒ Budd Family LLC [OT] Description: Notes Receivable paid off March, 2021.	DC	None	Interest	$1 - $200	
Budd Family LLC (1) ⇒ Budd Family LLC [RP] Location: Wilmington/New Hanover, NC, US Description: Net activity was a loss.	DC	$250,001 - $500,000	Rent	$2,501 - $5,000	
Budd Family LLC (1) ⇒ Budd Family LLC [OL] Location: Winston-Salem/Forsyth, NC, US Description: Investment in real estate LLC, owns commercial warehouse on Hope Church Road in Winston-Salem, NC.	DC	$250,001 - $500,000	Rent	$5,001 - $15,000	
Budd Family LLC (2) ⇒ Budd Family LLC [OL] Location: Winston-Salem/Forsyth, NC, US Description: Investment in real estate LLC, owns commercial warehouse on Hope Church Road in Winston-Salem, NC.	DC	$250,001 - $500,000	Rent	$5,001 - $15,000	
Budd Family LLC (2) ⇒ Budd Family LLC [FA] Location: Advance/Davie County, NC, US Description: Net activity was a loss. Cattle farm.	DC	$250,001 - $500,000	Rent	$2,501 - $5,000	
Budd Family LLC (2) ⇒ Budd Family LLC [OT] Description: Notes Receivable paid off March, 2021.	DC	None	Interest	$1 - $200	
Budd Family LLC (2) ⇒ Budd Family LLC [RP] Location: Wilmington/New Hanover, NC, US Description: Net activity was a loss.	DC	$250,001 - $500,000	Rent	$2,501 - $5,000	
Budd Family LLC (3) ⇒ Budd Family LLC [FA] Location: Advance/Davie County, NC, US Description: Net activity was a loss. Cattle farm.	DC	$250,001 - $500,000	Rent	$2,501 - $5,000	
Budd Family LLC (3) ⇒ Budd Family LLC [OT] Description: Notes Receivable paid off March, 2021.	DC	None	Interest	$1 - $200	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Budd Family LLC (3) ⇒ Budd Family LLC [RP] Location: Wilmington/New Hanover, NC, US Description: Net activity was a loss.	DC	$250,001 - $500,000	Rent	$2,501 - $5,000	☐
Budd Family LLC (3) ⇒ Budd Family LLC [OL] Location: Winston-Salem/Forsyth, NC, US Description: Investment in real estate LLC, commercial warehouse on Hope Church Road in Winston-Salem, NC.	DC	$250,001 - $500,000	Rent	$5,001 - $15,000	☐
Citibank Client Services [BA]		None	Interest	$201 - $1,000	☐
Due from Ted Budd for Senate Committee [DO]		$250,001 - $500,000	None		☐
NC 529 Cons Grwth Portfolio [5P] Location: NC Description: Assets transferred from VG Stock Bonds on 7/7/2021	DC	$15,001 - $50,000	Tax-Deferred		☐
NC 529 Plan - Interest Accum Portfolio [5P] Location: NC	DC	None	Tax-Deferred		☐
NC 529 VG Stocks Bonds [5P] Location: NC	DC	None	Tax-Deferred		☐
NEST 529 Age-Based Aggressive 15-16 D [5P] Location: NE Description: Assets transferred to NEST 529 Age-Based Aggressive 17-18 D on 7/2/2021.	DC	None	Tax-Deferred		☑
NEST 529 Age-Based Aggressive 17-18 D [5P] Location: NE Description: Balance of assets transferred from NEST 529 Age-Based Aggressive 17 - 18 D on 7/2/2021.	DC	$15,001 - $50,000	Tax-Deferred		☐
PS1 Rural Hall LLC, 100% Interest [OL] Location: Rural Hall, Forsyth, NC, US Description: Retail sporting goods, indoor range and training facility. Doing business as ProShots.		$1,000,001 - $5,000,000	Form 1040, Sch C	$100,001 - $1,000,000	☐
T Paul Properties LLC ⇒ Hope Church Road Commercial Warehouse [RP] Location: WINSTON SALEM, NC, US	SP	$500,001 - $1,000,000	Rent	$15,001 - $50,000	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
The Lincoln National Life Insurance Company ⇒ LVIP SSGA S&P 500 Index SC (946) [MF]		$100,001 - $250,000	Tax-Deferred		☐
The Lincoln National Life Insurance Company ⇒ LVIP SSGA S&P 500 Index SC (946) [MF]		$1,001 - $15,000	Tax-Deferred		☐
The Lincoln National Life Insurance Company ⇒ LVIP Vanguard Bnd Alloc Fnd SC (791) [MF]		$1,001 - $15,000	Tax-Deferred		☐
The Lincoln National Life Insurance Company ⇒ LVIP Vanguard Bnd Alloc Fnd SC (791) [MF]		$100,001 - $250,000	Tax-Deferred		☐
TPB ROTH IRA ⇒ Emerging Markets S [MF]		$1,001 - $15,000	Tax-Deferred		☑
TPB ROTH IRA ⇒ Global Infrastructure CL S [MF]		$1,001 - $15,000	Tax-Deferred		☑
TPB ROTH IRA ⇒ Global Real Estate Securities S [MF]		None	Tax-Deferred		☑
TPB ROTH IRA ⇒ International Developed Mrkt CL S [MF]		$15,001 - $50,000	Tax-Deferred		☐
TPB ROTH IRA ⇒ Invesco Equally Weighted S&P 500 [MF]		$15,001 - $50,000	Tax-Deferred		☑
TPB ROTH IRA ⇒ Ishares TR Residential ETF [EF]		$1,001 - $15,000	Tax-Deferred		☑
TPB ROTH IRA ⇒ Opportunistic Credit Fund S [MF]		$1 - $1,000	Tax-Deferred		☑
TPB ROTH IRA ⇒ US Small Cap Equity Class S [MF]		$1,001 - $15,000	Tax-Deferred		☐
TPB ROTH IRA ⇒ Van Eck CM Commodity Index Fund [MF]		$1,001 - $15,000	Tax-Deferred		☑
Truist Bank (formerly BB&T) [BA]		$100,001 - $250,000	Interest	$1 - $200	☐
DESCRIPTION: Total comprised of joint, single and DC accounts.					

* 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?
2017 IRRV TR FBO 1 ⇒ Emerging Markets S [MF]	DC	08/4/2021	S	$1,001 - $15,000	✓
2017 IRRV TR FBO 1 ⇒ Fidelity Inflat-Prot BD Index Fund [MF]	DC	06/2/2021	P	$15,001 - $50,000	
2017 IRRV TR FBO 1 ⇒ Tax Exempt Bond Fund Class S [MF]	DC	06/2/2021	S (partial)	$15,001 - $50,000	✓
2017 IRRV TR FBO 1 ⇒ Tax Exempt High Yield Bond S [MF]	DC	08/4/2021	P	$1,001 - $15,000	
2017 IRRV TR FBO 2 ⇒ Emerging Markets S [MF]	DC	08/4/2021	S	$1,001 - $15,000	✓
2017 IRRV TR FBO 2 ⇒ Fidelity Inflat-Prot BD Index Fund [MF]	DC	06/2/2021	P	$15,001 - $50,000	
2017 IRRV TR FBO 2 ⇒ Tax Exempt Bond Fund Class S [MF]	DC	06/2/2021	S (partial)	$15,001 - $50,000	✓
2017 IRRV TR FBO 2 ⇒ Tax Exempt High Yield Bond S [MF]	DC	08/4/2021	P	$1,001 - $15,000	
2017 IRRV TR FBO 3 ⇒ Emerging Markets S [MF]	DC	08/4/2021	S	$1,001 - $15,000	✓
2017 IRRV TR FBO 3 ⇒ Fidelity Inflat-Prot BD Index Fund [MF]	DC	06/2/2021	P	$15,001 - $50,000	
2017 IRRV TR FBO 3 ⇒ Tax Exempt Bond Fund Class S [MF]	DC	06/2/2021	S (partial)	$15,001 - $50,000	✓
2017 IRRV TR FBO 3 ⇒ Tax Exempt High Yield Bond S [MF]	DC	08/4/2021	P	$1,001 - $15,000	
AKB - ROTH IRA ⇒ Emerging Markets S [MF]	SP	01/19/2021	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
AKB - ROTH IRA ⇒ Global Infrastructure CL S [MF]	SP	10/26/2021	P	$1,001 - $15,000	
AKB - ROTH IRA ⇒ Global Real Estate Securities S [MF]	SP	09/14/2021	S	$1,001 - $15,000	☑
AKB - ROTH IRA ⇒ Invesco Equally Weighted S&P 500 [MF]	SP	01/19/2021	S (partial)	$1,001 - $15,000	☐
AKB - ROTH IRA ⇒ Invesco Equally Weighted S&P 500 [MF]	SP	10/26/2021	S (partial)	$1,001 - $15,000	☑
AKB - ROTH IRA ⇒ Ishares TR Residential ETF [MF]	SP	09/16/2021	P	$1,001 - $15,000	
AKB - ROTH IRA ⇒ Ishares TR Residential ETF [MF]	SP	10/28/2021	P	$1,001 - $15,000	
AKB - ROTH IRA ⇒ Opportunistic Credit Fund S [MF]	SP	05/13/2021	S (partial)	$1,001 - $15,000	☐
AKB - ROTH IRA ⇒ Opportunistic Credit Fund S [MF]	SP	10/26/2021	S (partial)	$1,001 - $15,000	☐
AKB - ROTH IRA ⇒ Van Eck CM Community Index Fund [MF]	SP	10/26/2021	P	$1,001 - $15,000	
AKB Individual TOD 18 ⇒ Dimensional ETF Trust US Equity [EF]	SP	09/7/2021	P	$1,001 - $15,000	
AKB Individual TOD 18 ⇒ Dimensional ETF Trust US Equity [EF]	SP	10/7/2021	P	$1,001 - $15,000	
AKB Individual TOD 18 ⇒ Dimensional ETF Trust US Equity [EF]	SP	11/10/2021	P	$1,001 - $15,000	
AKB Individual TOD 18 ⇒ Dimensional ETF Trust US Equity [EF]	SP	12/6/2021	P	$1,001 - $15,000	
AKB Individual TOD 18 ⇒ Dimensional ETF Trust World EX US [EF]	SP	11/10/2021	P	$1,001 - $15,000	
AKB Individual TOD 18 ⇒	SP	04/5/2021	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Tax Exempt High Yield Bond S [MF]			(partial)		☐
AKB Individual TOD 18 ⇒ Tax Managed International Equity S [MF]	SP	09/3/2021	P	$1,001 - $15,000	
AKB Individual TOD 18 ⇒ Tax Managed International Equity S [MF]	SP	09/28/2021	S (partial)	$1,001 - $15,000	☐
AKB Individual TOD 18 ⇒ Tax Managed US Mid & Small CP S [MF]	SP	01/5/2021	S (partial)	$1,001 - $15,000	☐
AKB Individual TOD 96 ⇒ DFA Tax Managed US Equity Portfolio [MF]	SP	04/8/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ DFA Tax Managed US Equity Portfolio [MF]	SP	06/3/2021	S	$1,001 - $15,000	☑
AKB Individual TOD 96 ⇒ Dimensional ETF Trust US Equity [EF]	SP	08/6/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ Dimensional ETF Trust US Small Cap [EF]	SP	07/8/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ Dimensional ETF Trust US Small Cap [EF]	SP	12/27/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ Russell Tax-Managed Real Assets CL S [MF]	SP	06/3/2021	S (partial)	$1,001 - $15,000	☑
AKB Individual TOD 96 ⇒ Tax Exempt High Yield Bond S [MF]	SP	06/3/2021	S (partial)	$1,001 - $15,000	☑
AKB Individual TOD 96 ⇒ Tax Managed International Equity S [MF]	SP	06/3/2021	S (partial)	$15,001 - $50,000	☑
AKB Individual TOD 96 ⇒ Tax Managed International Equity S [MF]	SP	08/3/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ Tax Managed International Equity S [MF]	SP	10/4/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ Tax Managed International Equity S [MF]	SP	12/2/2021	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
AKB Individual TOD 96 ⇒ Tax Managed US Large Cap Fund CL [MF]	SP	03/4/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ Tax Managed US Large Cap Fund CL S [MF]	SP	05/10/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ Tax Managed US Large Cap Fund CL S [MF]	SP	06/3/2021	S (partial)	$15,001 - $50,000	☑
AKB Individual TOD 96 ⇒ Tax Managed US Large Cap Fund CL S [MF]	SP	06/8/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ Tax Managed US Large Cap Fund CL S [MF]	SP	07/2/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ Tax Managed US Large Cap Fund CL S [MF]	SP	09/2/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ Tax Managed US Large Cap Fund CL S [MF]	SP	11/2/2021	P	$1,001 - $15,000	
AKB Individual TOD 96 ⇒ Tax Managed US Large Cap Fund CL S [MF]	SP	12/22/2021	S (partial)	$1,001 - $15,000	☐
AKB Individual TOD 96 ⇒ Tax Managed US Mid & Small CP S [MF]	SP	06/3/2021	S (partial)	$1,001 - $15,000	☑
T Paul Properties LLC [OL] Location: Winston-Salem/Forsyth, NC, US Description: Investment in LLC - Real Estate rental property	SP	06/30/2021	P	$100,001 - $250,000	
TPB ROTH IRA ⇒ Emerging Markets S [MF]		01/19/2021	P	$1,001 - $15,000	
TPB ROTH IRA ⇒ Global Infrastructure CL S [MF]		10/26/2021	P	$1,001 - $15,000	
TPB ROTH IRA ⇒ Global Real Estate Securities S [MF]		09/14/2021	S	$1,001 - $15,000	☑
TPB ROTH IRA ⇒		01/19/2021	S	$1,001 - $15,000	☑

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Invesco Equally Weighted S&P 500 [MF]			(partial)		
TPB ROTH IRA ⇒ Invesco Equally Weighted S&P 500 [MF]		10/26/2021	S (partial)	$1,001 - $15,000	☐
TPB ROTH IRA ⇒ Ishares TR Residential ETF [MF]		09/16/2021	P	$1,001 - $15,000	
TPB ROTH IRA ⇒ Ishares TR Residential ETF [MF]		10/28/2021	P	$1,001 - $15,000	
TPB ROTH IRA ⇒ Opportunistic Credit Fund S [MF]		05/13/2021	S (partial)	$1,001 - $15,000	☐
TPB ROTH IRA ⇒ Van Eck CM Community Index Fund [MF]		10/26/2021	P	$1,001 - $15,000	

* 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

None disclosed.

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Truist	November, 2017	Business Line of Credit	$100,001 - $250,000
	Truist	April, 2021	Credit Card	$15,001 - $50,000
	Congressional Federal Credit Union	December, 2019	Home Mortgage	$250,001 - $500,000
	Truist	May, 2020	Personal Credit Line	$15,001 - $50,000

Schedule E: Positions

Position	Name of Organization
Secretary/Treasurer	Budd Family Management, Inc
Manager	T Paul Properties LLC

Schedule F: Agreements

None disclosed.

Schedule G: Gifts

None disclosed.

Schedule H: Travel Payments and Reimbursements

Trip Details					Inclusions		
Source	**Start Date**	**End Date**	**Itinerary**	**Days at Own Exp.**	**Lodging?**	**Food?**	**Family?**
Conservative Partnership Institute	02/11/2021	02/13/2021	Charlotte, NC - Miami-Coral Gable, Florida - Charlotte, NC	0	✓	✓	✓

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Asset Class Details

- 2017 IRRV TR FBO 1 (Owner: DC)
- 2017 IRRV TR FBO 2 (Owner: DC)
- 2017 IRRV TR FBO 3 (Owner: DC)
- AKB - ROTH IRA (Owner: SP)
- AKB Individual TOD 18 (Owner: SP)
  Location: US
- AKB Individual TOD 96 (Owner: SP)
  Location: US
- Budd Family LLC (1) (Owner: DC)
  Location: US
- Budd Family LLC (2) (Owner: DC)
  Location: US
- Budd Family LLC (3) (Owner: DC)
  Location: US
- T Paul Properties LLC (Owner: SP)
  Location: US
  Description: Partner in commercial real estate business
- The Lincoln National Life Insurance Company
- TPB ROTH 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. Theodore P. Budd , 08/12/2022