Filing ID #10056879

Financial Disclosure Report

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Filer Information

Name: Hon. John Kevin Ellzey Sr
Status: Member
State/District: TX06

Filing Information

Filing Type: Amendment Report
Filing Year: 2022
Filing Date: 08/13/2024

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
American Funds 2035 Trgt Date Retire R6 [MF] Description: Southwest Airlines Pilots Retirement Savings Plan		$250,001 - $500,000	Tax-Deferred		
Fidelity Government Income [MF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	
Fidelity Roth IRA ⇒ Fidelity Advisor Equity Income [MF]		$15,001 - $50,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Advisor Government Income [MF]		$1 - $1,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Advisor International Discovery [MF]		$1,001 - $15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Advisor Mid Cap II Fund [MF]		$1,001 - $15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Advisor New Insights Fund [MF]		$15,001 - $50,000	Tax-Deferred		
Fidelity Roth IRA ⇒		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Fidelity Advisor Small Cap Fund [MF]					
Fidelity Roth IRA ⇒ Fidelity Advisor Strategic Income Fund [MF]		$1 - $1,000	Tax-Deferred		
Franklin Mutual Shares Fund - Class A [MF]	JT	$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	
Global Life Insurance #9920 [WU]		$15,001 - $50,000	Tax-Deferred		
Liberty National Life Insurance #1475 [WU]		$1,001 - $15,000	Tax-Deferred		
Liberty National Life Insurance #3807 [WU]		$1,001 - $15,000	Tax-Deferred		
Liberty National Life Insurance #5655 [WU]		$1,001 - $15,000	Tax-Deferred		
Liberty National Life Insurance #5901 [WU]		$1,001 - $15,000	Tax-Deferred		
Liberty National Life Insurance #6728 [WU]		$1,001 - $15,000	Tax-Deferred		
Liberty National Life Insurance #7701 [WU]		$1,001 - $15,000	Tax-Deferred		
Liberty National Life Insurance #9707 [WU]		$15,001 - $50,000	Tax-Deferred		
Navy Federal Credit Union Checking Account [BA]	JT	$1,001 - $15,000	Dividends	$1 - $200	
Navy Federal Credit Union Savings Account [BA]	JT	$1 - $1,000	Dividends	$1 - $200	
Navy Mutual Permanent "Plus" [WU]		$1,001 - $15,000	Tax-Deferred		
USAA 529 Age-Based Option 12-13 Moderately Conservative Portfolio [5F] LOCATION: TX COMMENTS: Child 1		$50,001 - $100,000	Tax-Deferred		
USAA 529 Age-Based Option 9-11 Moderate Portfolio [5F] LOCATION: TX		$15,001 - $50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Comments: Child 2					

* Investment vehicle 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

None disclosed.

Schedule C: Earned Income

None disclosed.

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Reliance First Capital LLC	October 2020	Mortgage on personal residence	$250,001 - $500,000

Schedule E: Positions

Position	Name of Organization
Pilot	Southwest Airlines Company
Comments: On leave	

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.

Schedule A and B Investment Vehicle Details

- Fidelity 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. John Kevin Ellzey Sr, 08/13/2024