Filing ID #10055880

Financial Disclosure Report

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Filer Information

Name: Hon. Kevin Brady
Status: Former Member
State/District: TX08

Filing Information

Filing Type: Terminated Filer Report
Filing Year: 2023
Filing Date: 09/22/2023

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Blackrock 529 College Advantage Plan OH [MF]	DC	$1,001 - $15,000	None		[ ]
Blackrock 529 College Advantage Plan OH [MF]	DC	None	None		[x]
Description: Closed account May, 2021.					
DREY VIP APP Port/BYNMEL VIF APP Initial [FN]		$1 - $1,000	None		[ ]
Description: Closed account June 2019					
Fidelity VIP APP Port/EQ INC Initial [FN]		$15,001 - $50,000	None		[ ]
JP Morgan Chase & Co. (JPM) [ST]	SP	$1,001 - $15,000	Dividends	$1 - $200	[ ]
JP Morgan Chase Investment Services Corp HPQ IRA [MF]	SP	$15,001 - $50,000	Dividends	$201 - $1,000	[ ]
JP Morgan Chase IRA - Growth Income Tier I [MF]	SP	$100,001 - $250,000	Dividends	$201 - $1,000	[x]
Description: Transfer to Spouse JP Morgan Chase IRA MMAT.					
JP Morgan Chase IRA MMAT [BA]	SP	$100,001 - $250,000	Interest	$5,001 - $15,000	[x]

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
DESCRIPTION: Transfer from JP Morgan Chase IRA to IRA MMAT					
JP Morgan Chase Mutual Fund 564/Growth Advantage Fund [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☐
JP Morgan Chase Personal Checking Account [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	☐
JP Morgan Chase Retirement Plan [BA]	SP	$50,001 - $100,000	Interest	$1,001 - $2,500	☐
JP Morgan Chase Super Savings Account [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	☐
NeuberAMT SHRT DUR BD [FN]		$1,001 - $15,000	None		☐
NW AmCent NW InvitMultCap [FN]		$1,001 - $15,000	None		☐
NW NVIT MDCAP INDX 1 [MF]		$1,001 - $15,000	None		☐
Oppenheimer Global SECS/INVSCO OPP VI Global [FN]		$1,001 - $15,000	None		☐
Pacific Life VUL [WU]		$15,001 - $50,000	None		☐
Pacific Life VUL [WU]	SP	$1,001 - $15,000	None		☐
Putnam Fidelity TR Co TTEE BFG IRA [MF]	SP	$1,001 - $15,000	None		☐
Putnam Fidelity TR Co TTEE BFG IRA [MF]		$15,001 - $50,000	None		☐
Putnam Small Cap Growth and Income Fund [MF]		$15,001 - $50,000	Capital Gains	$1,001 - $2,500	☐
State of Texas Retirement Plan Account [PE]		$1,001 - $15,000	None		☐
Wells Fargo Checking Account [BA]	JT	$1 - $1,000	Interest	$1 - $200	☐
Wells Fargo Savings Account [BA]	JT	$1 - $1,000	Interest	$1 - $200	☐

* 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?
Blackrock 529 College Advantage Plan OH [5P] Location: TX Description: Account was closed May, 2021.	DC	05/1/2021	S	$1,001 - $15,000	☐
JP Morgan Chase IRA [IR] Description: Transferred amount to JP Morgan Chase IRA MMAT.	SP	10/6/2022	E	$100,001 - $250,000	

* 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
SP	JP Morgan Chase Auto	April 22, 2022	Vehicle loan	$15,001 - $50,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
January 1997	State of Texas	State of Texas Retirement Plan

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.

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. Kevin Brady , 09/22/2023