



FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Marjorie Taylor Mrs Greene
Status: Member
State/District: GA14

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|---------------------------|----------------|-------------------|--------------------------|
| Congressional Federal Credit Union [BA] | | \$1,000,001 - \$5,000,000 | Interest | \$1,001 - \$2,500 | <input type="checkbox"/> |
| DC3 401k ⇒ 500 Index Fund [MF] | DC | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| DC3 401k ⇒ Fidelity Intenational Index [MF] | DC | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| DC3 401k ⇒ Vangaurd Growth Index Fund [MF] | DC | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| DC3 401k ⇒ Vangaurd Small Cap Index [MF] | DC | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| DC3 IRA ⇒ Block, Inc. Class A Common Stock, (SQ) [ST] | DC | \$1 - \$1,000 | None | | <input type="checkbox"/> |
| DC3 IRA ⇒ Caterpillar, Inc. (CAT) [ST] | DC | \$1 - \$1,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DC3 IRA ⇒ Johnson & Johnson (JNJ) [ST] | DC | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |

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|---|-------|---------------------------|----------------|----------------------|--------------------------|
| DC3 IRA ⇒ Nestle SA Sponsored ADR representing Registered Shares Series B (NSRGY) [ST] | DC | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DC3 IRA ⇒ Schwab Custodial Money Market [BA] | DC | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| DC3 IRA ⇒ Southern Company (SO) [ST] | DC | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DC3 IRA ⇒ Tesla, Inc. (TSLA) [ST] | DC | \$1 - \$1,000 | None | | <input type="checkbox"/> |
| DC3 IRA ⇒ Truist Financial Corporation (TFC) [ST] | DC | \$1 - \$1,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| DC3 IRA ⇒ Walt Disney Company (DIS) [ST] | DC | \$1 - \$1,000 | None | | <input type="checkbox"/> |
| Kids college fund ⇒ Path2College DC3 [5P] LOCATION: GA | JT | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Marjorie 401K ⇒ 500 Index Fund [MF] | | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| Marjorie 401K ⇒ Fidelity International Index [MF] | | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| Marjorie 401K ⇒ Vanguard Growth Index Fund [MF] | | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| Marjorie 401K ⇒ Vanguard Small Cap Index [MF] | | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| Non-Primary Residence [RP] LOCATION: Washington, DC, US DESCRIPTION: DC Condominium | | \$500,001 - \$1,000,000 | None | | <input type="checkbox"/> |
| PMLTD, INC. [RP] LOCATION: Alpharetta/ Fulton, GA, US | | \$1,000,001 - \$5,000,000 | Rent | \$50,001 - \$100,000 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-------------------------------|---------------------------|------------------------------|--------------------------|
| DESCRIPTION: (formerly Marconi Drive Office, Inc.) | | | | | |
| Taylor Commercial, Inc., 51% Interest [OL] | | \$5,000,001 - \$25,000,000 | Ownership Distribution | \$1,000,001 - \$5,000,000 | <input type="checkbox"/> |
| LOCATION: Alpharetta / Fulton, GA, US | | | | | |
| DESCRIPTION: Family owned business. Income was annual distribution. | | | | | |

* 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 |
|-------|----------|---------------|--|--------------------------|
| | UCB | 2020 | Loan for property for Marconi Drive Offices, LLC | \$100,001 - \$250,000 |

SCHEDULE E: POSITIONS

None disclosed.

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

- o DC3 401k (Owner: DC)

- DC3 IRA (Owner: DC)
DESCRIPTION: Derek's IRA
- Kids college fund (Owner: JT)
LOCATION: GA
- Marjorie 401K

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. Marjorie Taylor Mrs Greene , 05/15/2024