



Filing ID #10059416

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Marc A. Veasey  
**Status:** Member  
**State/District:** TX33

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 08/13/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Texas Employees Retirement System Plan [DB]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo - 529 College Savings Plan ⇒ The Growth Fund of America Class 529-A Shares (CGFAX) [MF]	JT	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo - 529 College Savings Plan ⇒ The Growth Fund of America Class 529-C Shares (CGFCX) [MF]	JT	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo - Roth IRA ⇒ FMT Rising Dividends Fd Cl R6 (FRISX) [MF] DESCRIPTION: Transferred from Edward Jones - Roth IRA	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo - Roth IRA ⇒ Hartford Schrodgers International Stock Fund Class F (HSWFX) [MF] DESCRIPTION: Transferred from Edward Jones - Roth IRA	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo - Roth IRA ⇒ iShares Core 1-5 Year USD Bond ETF (ISTB) [EF] DESCRIPTION: Transferred from Edward Jones - Roth IRA	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo - Roth IRA ⇒ JPMorgan Large Cap Growth Fund R6 (JLGMX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Transferred from Edward Jones - Roth IRA					
Wells Fargo - Roth IRA ⇒ The Hartford Dividend & Growth Fund Class F (HDGFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Transferred from Edward Jones - Roth IRA					
Wells Fargo - Roth IRA ⇒ The Hartford MidCap Value Fund Class F (HMOVFX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Transferred from Edward Jones - Roth IRA					
Wells Fargo - Traditional IRA ⇒ American Funds Growth Portfolio Class A (GWPAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

\* 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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo - 529 College Savings Plan ⇒ American Balanced Fund, Class A Shs (ABALX) [MF]	JT	12/20/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo - 529 College Savings Plan ⇒ American Funds Capital World Growth & Income Fund Class A Shares (CWGIX) [MF]	JT	12/20/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo - 529 College Savings Plan ⇒ American Funds Int Bond Fd of America C (IBFCX) [MF]	JT	12/20/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo - 529 College Savings Plan ⇒ American Mutual Fund Class A Shares (AMRMX) [MF]	JT	12/20/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo - 529 College Savings Plan ⇒ Capital Income Builder Cl A Shs (CAIBX) [MF]	JT	12/20/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo - 529 College Savings Plan ⇒ New Perspective Fund, Class A Shares (ANWPX) [MF]	JT	12/20/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo - 529 College Savings Plan ⇒ The Bond Fund of America, Class C Shares (BFACX) [MF]	JT	12/20/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo - 529 College Savings Plan ⇒ The Growth Fund of America Class 529-A Shares (CGFAX) [MF]	JT	12/20/2023	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Wells Fargo - 529 College Savings Plan ⇒ The Growth Fund of America Class 529-C Shares (CGFCX) [MF]	JT	12/20/2023	P	\$1,001 - \$15,000	
Wells Fargo - 529 College Savings Plan ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]	JT	12/20/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Wells Fargo - Traditional IRA ⇒ American Funds Growth Portfolio Class A (GWPAX) [MF]	SP	12/20/2023	P	\$1,001 - \$15,000	

\* 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 C: EARNED INCOME

Source	Type	Amount
Open Channels Group	Spouse Salary	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Citibank	December 2023	Credit Card	\$15,001 - \$50,000
SP	NewRez LLC DBA Shellpoint Mortgage Servicing	December 2020	Mortgage	\$100,001 - \$250,000
JT	Wells Fargo	June 2021	Mortgage on DC residence	\$500,001 - \$1,000,000

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2005	Myself & State of Texas	Pension annuity for service in state legislature.

### 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?
The Aspen Institute, Inc.	08/26/2023	09/1/2023	DFW Airport, TX - Oslo/Bergen, Norway - DFW Airport, TX	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>Wells Fargo - 529 College Savings Plan (Owner: JT) LOCATION: TX DESCRIPTION: Previously held with Edward Jones</li><li>Wells Fargo - Roth IRA (Owner: SP)</li><li>Wells Fargo - Traditional IRA (Owner: SP)</li></ul>
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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. Marc A. Veasey , 08/13/2024