



Filing ID #10059993

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Adrian Smith  
**Status:** Member  
**State/District:** NE03

## 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?
Bank of America Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
CarterBaldwin [PS]	SP	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
DESCRIPTION: Partner stock distribution					
First National Bank of Omaha (Gering, NE) (Checking) [BA]		\$15,001 - \$50,000	Interest	None	<input type="checkbox"/>
DESCRIPTION: Same account; new bank name; previously Western States Bank; 3 separate accounts					
Meridian Trust Credit Union (Savings and Checking) [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Same account; new name of credit union					
Miller Lake Corporation Location: Laramie, WY [PS]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: an undivided interest in land and improvements					
My Other Garage (storage business) [OL]		\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Gering/Scotts Bluff, NE, US					
DESCRIPTION: Owner of storage units. Income in the form of rent.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Nebraska Teacher Retirement [PE]		\$1,001 - \$15,000	None		<input type="checkbox"/>
NEST 529- Income Fund of America CL A [5P]		\$15,001 - \$50,000	Mutual Fund/ Investment	None	<input type="checkbox"/>
LOCATION: NE DESCRIPTION: Children college savings					
Platte Valley Bank Savings Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Prin LifeTime Hybrid 2040 CiT [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: spouse 401k plan					
Real Estate Rental [RP]		\$500,001 - \$1,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Elkton, VA, US					
Real Estate Rental [RP]		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Cheverly, MD, US					
Real Estate Rental [RP]		\$50,001 - \$100,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Gering, NE, US					
Real Estate Rentals [RP]		\$500,001 - \$1,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Stanley, VA, US DESCRIPTION: 50 percent ownership in real estate rental property					
Riverstone Bank Checking Account [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Checking account for rental property					
State Farm Roth IRA - BlackRock International Index [IH]		\$1,001 - \$15,000	None		<input type="checkbox"/>
State Farm Roth IRA - BlackRock S&P 500 Index [IH]		\$15,001 - \$50,000	None		<input type="checkbox"/>
State Farm Roth IRA - BlackRock Small Cap Index [IH]		\$1,001 - \$15,000	None		<input type="checkbox"/>
State Farm Roth IRA - BlackRock Total Return [IH]		\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
State Farm TSA - Bloomington IL [FN]		\$1,001 - \$15,000	None		<input type="checkbox"/>
State Farm Universal Life Insurance [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Vacant lots [RP]		\$50,001 - \$100,000	None		<input type="checkbox"/>
LOCATION: Stanley, VA, US DESCRIPTION: 50 percent ownership in 2 vacant lots adjacent to rental property					

\* 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?
CarterBaldwin [PS] LOCATION: US DESCRIPTION: Partner stock	SP	02/1/2023	P	\$1,001 - \$15,000	
CarterBaldwin [PS] LOCATION: US DESCRIPTION: Partner stock	SP	07/17/2023	P	\$15,001 - \$50,000	

\* 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
CarterBaldwin	spouse salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	First National Bank of Omaha	October 2019	real estate rental in Gering	\$15,001 - \$50,000
	TD Bank	September 2020	real estate rental in Elkton	\$250,001 - \$500,000
	TD Bank	July 2020	real estate rental in Cheverly	\$250,001 - \$500,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Riverstone Bank	September 2022	Loan	\$100,001 - \$250,000
	Riverstone Bank	September 2022	Loan	\$500,001 - \$1,000,000
COMMENTS: 50 percent ownership in rental property at Stanley, VA				

### SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Leadership Institute's Congressional Advisory Board
Board Member	ThankUSA's Congressional Advisory Board

### 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?
Switzerland (MECEA)	04/10/2023	04/15/2023	Dulles, Virginia - Zurich, Switzerland - Geneva, Switzerland - Dulles, Virginia	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Japan (MECEA)	06/24/2023	06/30/2023	Dulles, Virginia - Tokyo, Japan - Kyoto, Japan - Tokyo, Japan - Scottsbluff, Nebraska	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### 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. Adrian Smith , 05/15/2024