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FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Bruce Westerman
Status: Member
State/District: AR04

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/6/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fisher IRA ⇒ Cash within IRA [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ Invesco NASDAQ Internet ETF (PNQI) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ Invesco QQQ Trust, Series 1 [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ Invesco S&P 500 Top 50 ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares Global Healthcare ETF (IXJ) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Europe Financials Sector Index Fund (EUFN) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Eurozone ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares MSCI Global Select Metals & Mining Producers Fund [EF]					
Fisher IRA ⇒ iShares MSCI Japan (EWJ) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ iShares TR Global Energy ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares TR Global Tech ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares Trust iShares U.S. Transportation ETF (IYT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares U.S. Broker-Dealers & Securities Exchanges ETF (IAI) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares U.S. Financials ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ iShares US Medical Devices (IHI) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fisher IRA ⇒ SPDR Cons Disc Select Sector [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ SPDR Industrials Select Sector [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ SPDR Portfolio Long Term Treasury ETF (SPTL) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ SPDR Portfolio Short Term Treasury ETF (SPTS) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ SPDR S&P Retail ETF (XRT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fisher IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard FTSE European ETF [EF]					<input type="checkbox"/>
Fisher IRA ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley IRA ⇒ ISHARES CORE MSCI EAFE ETF (IEFA) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley IRA ⇒ ISHARES CORE MSCI EMERGING [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Morgan Stanley IRA ⇒ ISHARES CORE S&P US GROWTH (IUSG) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley IRA ⇒ ISHARES CORE S&P US VALUE (IUSV) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley IRA ⇒ ISHARES RUSSELL 2000 GRWTH ETF (IWO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley IRA ⇒ ISHARES RUSSELL 2000 VALUE ETF (IWN) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley IRA ⇒ ISHARES RUSSELL MIDCAP G ETF (IWP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley IRA ⇒ ISHARES RUSSELL MIDCAP V ETF (IWS) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley IRA ⇒ Morgan Stanley Private Bank [OT] DESCRIPTION: Cash holding within IRA		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Arkansas Pension [PE]	SP	Undetermined	Tax-Deferred		<input 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?
Fisher IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		03/10/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Fisher IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		04/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		07/14/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ Invesco S&P 500 Top 50 ETF (XLG) [EF]		03/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ Invesco S&P 500 Top 50 ETF (XLG) [EF]		04/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares Global Energy ETF (IXC) [EF]		03/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares Global Energy ETF (IXC) [EF]		04/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares Global Healthcare ETF (IXJ) [EF]		03/10/2023	P	\$1,001 - \$15,000	
Fisher IRA ⇒ iShares Global Healthcare ETF (IXJ) [EF]		04/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares Global Healthcare ETF (IXJ) [EF]		07/14/2023	P	\$1,001 - \$15,000	
Fisher IRA ⇒ iShares Global Tech ETF (IXN) [EF]		04/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Eurozone ETF (EZU) [EF]		04/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares MSCI Global Select Metals & Mining Producers Fund (PICK) [EF]		04/10/2023	P	\$1,001 - \$15,000	
Fisher IRA ⇒ iShares Trust iShares U.S. Transportation ETF (IYT) [EF]		03/10/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fisher IRA ⇒ iShares Trust iShares U.S. Transportation ETF (IYT) [EF]		04/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares Trust iShares U.S. Transportation ETF (IYT) [EF]		07/14/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares U.S. Broker-Dealers & Securities Exchanges ETF (IAI) [EF]		03/10/2023	P	\$1,001 - \$15,000	
Fisher IRA ⇒ iShares U.S. Broker-Dealers & Securities Exchanges ETF (IAI) [EF]		04/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ iShares U.S. Financial ETF (IYF) [EF]		04/10/2023	P	\$1,001 - \$15,000	
Fisher IRA ⇒ iShares U.S. Financial ETF (IYF) [EF]		07/14/2023	P	\$1,001 - \$15,000	
Fisher IRA ⇒ SPDR Portfolio Long Term Treasury ETF (SPTL) [EF]		04/10/2023	P	\$1,001 - \$15,000	
Fisher IRA ⇒ SPDR Portfolio Short Term Treasury ETF (SPTS) [EF]		04/10/2023	P	\$1,001 - \$15,000	
Fisher IRA ⇒ SPDR S&P Retail ETF (XRT) [EF]		03/10/2023	P	\$1,001 - \$15,000	
Fisher IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		04/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		07/14/2023	P	\$1,001 - \$15,000	
Fisher IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		03/10/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fisher IRA ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]		03/10/2023	P	\$1,001 - \$15,000	
Fisher IRA ⇒ Vanguard FTSE European ETF (VGK) [EF]		04/10/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fisher IRA ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		04/10/2023	P	\$15,001 - \$50,000	
Morgan Stanley IRA ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		12/28/2023	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
Lakeside School District	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	US BANK	December 2014	Equity Line - Home	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Arkansas Forestry Association
Director	Cooper-Anthony Child Advocacy Center

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

- Fisher IRA
- Morgan Stanley 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. Bruce Westerman , 08/6/2024