



Filing ID #10060381

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Robert B. Aderholt
Status: Member
State/District: AL04

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?
6207 30th Street North [RP] LOCATION: Arlington, VA, US	JT	\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
abrdn Healthcare Investors Shares of Beneficial Interest (HQH) [ST] DESCRIPTION: Formerly Tekla Healthcare Investors		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Alabaster AL Brd of Ed SPL Tax WTS [GS]	SP	\$15,001 - \$50,000	Capital Gains, Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
AMC Entertainment Holdings, Inc. Class A (AMC) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
America Movil, S.A.B. de C.V. American Depositary Receipt Series L (AMX) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Armada Properties LLC, 100% Interest [OL] LOCATION: Haleyville, AL, US DESCRIPTION: Single member LLC - SP	SP	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Banco Santander, S.A. Sponsored ADR (SAN) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Bank Independent [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bankfirst [BA]	DC	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bankfirst [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Bankfirst [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Bankfirst - Armadale Properties LLC [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Bankfirst - IRA [IH]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Congressional Federal Credit Union [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Elko Mains LLC, 25% Interest [OL]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: Huntsville, AL, US DESCRIPTION: Elko Mains LLC 2004 Old Big Cove Road Huntsville, AL 35801					
Federated Capital Reserves [MF]	JT	Undetermined	None		<input type="checkbox"/>
Fidelity Treasury Money Market Fund: Capital Reserves Class (FSRXX) [MF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Forbright Bank [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Greenbrier Enterprises LLC, 21% Interest [OL]	SP	\$1,000,001 - \$5,000,000	Capital Gains, Dividends, Interest, Ordinary Business Income, Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Madison, AL, US DESCRIPTION: Greenbrier Enterprises LLC 9785 Segers Road Madison, AL 35756-3909					
Greenbrier Enterprises LLC, 4% Interest [OL]	DC	\$100,001 - \$250,000	Capital Gains, Dividends, Interest, Ordinary Business Income, Rent	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Madison, AL, US DESCRIPTION: Greenbrier Enterprises LLC 9785 Segers Road Madison AL 35756-3909					
GSK plc American Depositary Shares (GSK) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Guntersville AL Pub Bldg Auth REVS BDS, DHR Project [GS]	SP	\$50,001 - \$100,000	Capital Gains, Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Haleon plc American Depositary Shares (HLN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Exchange from GSK plc American Depositary Shares (Each representing two Ordinary Shares) (GSK)					
Hoggle Ridge Properties LLC, 100% Interest [OL]		\$1,000,001 - \$5,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Haleyville, AL, US DESCRIPTION: Single member LLC - Asset part of Internal Revenue Code section 1031 exchange from prior year					
Jasper AL Wtr Wks & Swr Brd IN REV, BDS [GS]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
Lucid Group, Inc. (LCID) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Navistar International Corporation (NAV) [ST]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
New York Life Insurance Company [WU]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
DESCRIPTION: Whole life insurance					
NY Life Securities LLC - IRA [IH]		\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Oppenheimer Holdings, Inc. Class A Common Stock (OPY) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Rivian Automotive, Inc. - Class A (RIVN) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Shirleys Dacha LLC, 50% Interest [OL]	SP	\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Huntsville, AL, US DESCRIPTION: Shirleys Dacha LLC 2004 Old Big Cove Road Huntsville, AL 35801					
Snap Inc. Class A (SNAP) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Tesla, Inc. (TSLA) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Voya Financial Classic Money Market Fund [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Webull Financial LLC - Cash Account [BA]		\$1 - \$1,000	None		<input type="checkbox"/>

* 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?
abrdn Healthcare Investors Shares of Beneficial Interest (HQH) [ST] DESCRIPTION: Acquisition - Formerly Tekla Healthcare Investors		10/30/2023	E	\$1,001 - \$15,000	
Alabaster AL Brd of Ed SPL Tax WTS [GS]	SP	07/14/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Guntersville AL Pub Bldg Auth REVS BDS, DHR Project [GS]	SP	04/24/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Guntersville AL Pub Bldg Auth REVS BDS, DHR Project [GS]	SP	07/14/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Haleon plc American Depositary Shares (HLN) [ST] DESCRIPTION: Exchange from GSK plc American Depositary Shares (Each representing two Ordinary Shares) (GSK)		01/1/2023	E	\$1,001 - \$15,000	

* 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
JT	LoanCare LLC	October 2020	Mortgage on 6207 30th Street North, Arlington, VA	\$250,001 - \$500,000
	Bank Independent	October 2023	Hoggle Ridge Properties LLC - Mortgage	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

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?
Fellowship Foundation (d.b.a. International Foundation)	05/25/2023	05/30/2023	Washington DC - Serbia Croatia - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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. Robert B. Aderholt , 08/13/2024