



Filing ID #10060806

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Michael C. Burgess  
**Status:** Member  
**State/District:** TX26

## 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?
American Airlines Group, Inc. (AAL) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Bath & Body Works, Inc. (BBWI) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Brighthouse Financial, Inc. (BHF) [ST]	SP	\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
E Trade (Formerly Capital One Investing Cash Balance) [BA]	SP	\$1 - \$1,000	Interest	None	<input type="checkbox"/>
Fidelity Capital Appreciation [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Cash Reserves [BA]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Contrafund [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
iShares MSCI Austria Capped Investable Market Index Fund (EWO) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
MetLife, Inc. (MET) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Mineral Rights [RP]  LOCATION: multiple counties, TX, US DESCRIPTION: Dale Operating Gas Lease		Undetermined	royalty income	None	<input type="checkbox"/>
Mineral Rights [RP]  LOCATION: multiple counties, TX, US DESCRIPTION: Titan Operating Gas Lease		Undetermined	royalty income	None	<input type="checkbox"/>
Mineral Rights [RP]  LOCATION: multiple counties, TX, US DESCRIPTION: Vantage Energy Operating Gas Lease.	JT	Undetermined	royalty income	None	<input type="checkbox"/>
Non Investment Residence [RP]  LOCATION: Fort Worth, TX, US	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
Non Investment Residence [RP]  LOCATION: Hot Springs, AR, US	JT	\$250,001 - \$500,000	None		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1987-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1988-whole [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1989-whole [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991b-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991-whole [WU]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual Life Ins Co [WU]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Obsidian Energy Ltd. (OBE) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
OPKO Health Inc. (OPK) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Point Bank [BA]  DESCRIPTION: checking account	JT	\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Primary Residence [RP]  LOCATION: Little Elm, TX, US	JT	\$500,001 - \$1,000,000	None		<input checked="" type="checkbox"/>
Primary Residence [RP]  LOCATION: Pilot Point, TX, US	JT	None	Capital Gains	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
Schwab Cash Account (Cultivar Joint 1753) [BA]	JT	\$1 - \$1,000	Interest	None	<input type="checkbox"/>
Schwab Cash Account (Cultivar Joint 3289) [BA]	JT	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
Schwab f/k/a TD Ameritrade Insured Deposit [BA]  DESCRIPTION: Money Market		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Champlain Small Company Fund Institutional Shares (CIPNX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ EA Series Trust Alpha Architect Tail Risk ETF (CAOS) [EF]	JT	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ ETF Opportunities Trust Cultivar ETF (CVAR) [EF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ First Eagle Overseas Fund Class I (SGOIX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Gateway Fund Class Y (GTEYX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Hussman Strategic Growth Fd (HSGFX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iPath Bloomberg Commodity Index Total Return ETN (DJP) [ET]	JT	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares 20+ Year Treasury Bond ETF (TLT) [EF]					
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares Global Timber & Forestry ETF (WOOD) [EF]	JT	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Loomis Sayles Funds - Bond Fund Institutional Class (LSBDX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Loomis Sayles Funds - Global Bond Fund Instl Class (LSGBX) [MF]	JT	\$50,001 - \$100,000	Dividends	None	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Loomis Sayles Strategic Alpha Fund Class Y (LASYX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Thompson Bond Fund (THOPX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ VanEck Gold Miners ETF (GDX) [EF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 1753) ⇒ VanEck Natural Resources ETF (HAP) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Schwab Premier Bank (Cultivar Joint 3289) [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Schwab Value Advantage Money Market (SNAXX) (Cultivar Joint 3289) [BA]	JT	\$500,001 - \$1,000,000	Interest	\$15,001 - \$50,000	<input type="checkbox"/>
Southwest Airlines Company (LUV) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Advance Auto Parts Inc. (AAP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Spouse's Wells Fargo IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Best Buy Co., Inc. Common Stock (BBY) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Blackstone Inc. Common Stock (BX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Chemours Company (CC) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Fidelity Adv. Series - Equity Growth Fund [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Pfizer, Inc. (PFE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Prudential Financial, Inc. Common Stock (PRU) [ST]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Royal Bank Of Canada Common Stock (RY) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Stellantis N.V. Common Shares (STLA) [ST]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Stryker Corporation Common Stock (SYK) [ST]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Spouse's Wells Fargo IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Valero Energy Corporation Common Stock (VLO) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Viatis Inc. (VTRS) [ST]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Toyota Motor Corporation (TM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Undeveloped Property [RP]  LOCATION: Pilot Point, TX, US DESCRIPTION: 2 acres	JT	None	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Undeveloped Property [RP]  LOCATION: Hot Springs Village, AR, US	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Victorias Secret & Co. (VSCO) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Wells Fargo Bank Deposit Sweep Combined [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Wells Fargo IRA ⇒ AbbVie Inc. (ABBV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Advance Auto Parts Inc. (AAP) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ American Funds Growth Fund of America [BA]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo IRA ⇒ Blackstone Inc. Common Stock (BX) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Chemours Company (CC) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Cigna Corporation (CI) [ST]		\$1 - \$1,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Ford Motor Company (F) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ GE HealthCare Technologies Inc. - Common Stock (GEHC) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: partial share spin off from General Electric (GE)					
Wells Fargo IRA ⇒ General Electric Company (GE) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Intel Corporation (INTC) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ International Business Machines Corporation (IBM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ iShares TIPS Bond ETF (TIP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Kyndryl Holdings, Inc. (KD) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Wells Fargo IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$1 - \$1,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Nokia Corporation Sponsored American Depositary Shares (NOK) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ Obsidian Energy Ltd. (OBE) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo IRA ⇒ Organon & Co. (OGN) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Wells Fargo IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Phillips 66 Common Stock (PSX) [ST]		\$1 - \$1,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Southwest Airlines Company (LUV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Wells Fargo IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Valero Energy Corporation Common Stock (VLO) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Wells Fargo IRA ⇒ Warner Bros. Discovery, Inc. - Series A (WBD) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: 4/11/2022. Spin off from AT&T asset					
Wright Patterson Congressional Credit Union [BA]		\$1 - \$1,000	None		<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?
AbbVie Inc. (ABBV) [ST]	SP	07/6/2023	P	\$15,001 - \$50,000	
AbbVie Inc. (ABBV) [ST]	SP	08/14/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
AbbVie Inc. (ABBV) [ST]		12/8/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Advance Auto Parts Inc. (AAP) [ST]	SP	02/24/2023	P	\$15,001 - \$50,000	
Advance Auto Parts Inc. (AAP) [ST]	SP	02/24/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
			(partial)		
DESCRIPTION: The terms of the call are a strike price of \$140, and an expiration of 4/06/2023.					
Advance Auto Parts Inc. (AAP) [ST]		02/24/2023	P	\$15,001 - \$50,000	
Advance Auto Parts Inc. (AAP) [ST]		02/24/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: The terms of the call are a strike price of \$139, with an expiration of 04/06/23.					
Advanced Micro Devices, Inc. (AMD) [ST]	SP	08/9/2023	P	\$1,001 - \$15,000	
Alphabet Inc. - Class A (GOOGL) [ST]	SP	07/6/2023	P	\$15,001 - \$50,000	
Alphabet Inc. - Class A (GOOGL) [ST]	SP	08/14/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Amazon.com, Inc. (AMZN) [ST]	SP	07/6/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: The terms of the call are a strike price of \$29, and an expiration of 08/11/2023					
Amazon.com, Inc. (AMZN) [ST]	SP	07/6/2023	P	\$15,001 - \$50,000	
Amazon.com, Inc. (AMZN) [ST]	SP	08/14/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Amgen Inc. (AMGN) [ST]		04/5/2023	P	\$15,001 - \$50,000	
DESCRIPTION: Purchase of 100 shares					
Amgen Inc. - Common Stock (AMGN) [ST]		08/16/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	07/6/2023	P	\$1,001 - \$15,000	
Berkshire Hathaway Inc. New (BRK.B) [ST]	SP	08/14/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Best Buy Co., Inc. (BBY) [ST]	SP	08/22/2023	P	\$15,001 - \$50,000	
Blackstone Inc. (BX) [ST]	SP	02/24/2023	P	\$15,001 - \$50,000	
Blackstone Inc. (BX) [ST]	SP	02/24/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: The terms of the call are a strike price of \$89, and an expiration of 04/6/2023.					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Blackstone Inc. (BX) [ST]		02/24/2023	P	\$15,001 - \$50,000	
Blackstone Inc. (BX) [ST]	SP	06/1/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: The terms of the call are a strike price of \$89, and an expiration of 07/14/2023					
Blackstone Inc. (BX) [ST]	SP	07/17/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Blackstone Inc. (BX) [ST]		07/14/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Blackstone Inc. (BX) [ST]	SP	08/9/2023	P	\$15,001 - \$50,000	
Blackstone Inc. (BX) [ST]		12/8/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Blackstone Inc. (BX) [ST]	SP	09/25/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Blackstone Inc. (BX) [ST]		12/8/2023	P	\$15,001 - \$50,000	
Chemours Company (CC) [ST]	SP	07/6/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: The terms of the call are a strike price of \$36, and an expiration of 08/11/2023					
Chemours Company (CC) [ST]	SP	07/6/2023	P	\$15,001 - \$50,000	
Chemours Company (CC) [ST]		08/9/2023	P	\$15,001 - \$50,000	
CME Group Inc. - Class A (CME) [ST]		08/9/2023	P	\$15,001 - \$50,000	
DESCRIPTION: purchase of 100 shares					
CME Group Inc. - Class A (CME) [ST]		12/6/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Merck & Company, Inc. Common Stock (MRK) [ST]		09/13/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Microsoft Corporation (MSFT) [ST]	SP	02/24/2023	P	\$15,001 - \$50,000	
Microsoft Corporation (MSFT) [ST]	SP	04/10/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Microsoft Corporation (MSFT) [ST]		09/15/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
			(partial)		<input type="checkbox"/>
Palo Alto Networks, Inc. (PANW) [ST]		12/8/2023	P	\$15,001 - \$50,000	
Phillips 66 (PSX) [ST]		04/5/2023	P	\$15,001 - \$50,000	
DESCRIPTION: purchase of 200 shares.					
Phillips 66 (PSX) [ST]		07/21/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Primary Residence [RP]	JT	12/14/2023	P	\$500,001 - \$1,000,000	
LOCATION: Little Elm, TX, US					
Primary Residence [RP]	JT	07/12/2023	S	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
LOCATION: Pilot Point, TX, US					
Prudential Financial, Inc. (PRU) [ST]	SP	08/22/2023	P	\$15,001 - \$50,000	
Prudential Financial, Inc. Common Stock (PRU) [ST]	SP	09/15/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Royal Bank Of Canada (RY) [ST]	SP	08/9/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Champlain Small Company Fund Institutional Shares (CIPNX) [MF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ EA Series Trust Alpha Architect Tail Risk ETF (CAOS) [EF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ ETF Opportunities Trust Cultivar ETF (CVAR) [EF]	JT	08/21/2023	P	\$50,001 - \$100,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ First Eagle Overseas Fund Class I (SGOIX) [MF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Gateway Fund Class Y (GTEYX) [MF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Hussman Strategic Growth Fd (HSGFX) [MF]	JT	08/21/2023	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iPath Bloomberg Commodity Index Total Return ETN (DJP) [ET]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares Global Timber & Forestry ETF (WOOD) [EF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Loomis Sayles Funds - Bond Fund Institutional Class (LSBDX) [MF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Loomis Sayles Funds - Global Bond Fund Instl Class (LSGBX) [MF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Loomis Sayles Strategic Alpha Fund Class Y (LASYX) [MF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]	JT	08/21/2023	P	\$1,001 - \$15,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ Thompson Bond Fund (THOPX) [MF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ VanEck Gold Miners ETF (GDX) [EF]	JT	08/21/2023	P	\$15,001 - \$50,000	
Schwab Premier Bank (Cultivar Joint 1753) ⇒ VanEck Natural Resources ETF (HAP) [EF]	JT	08/21/2023	P	\$1,001 - \$15,000	
Spouse's Wells Fargo IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]	SP	11/29/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]	SP	11/29/2023	P	\$15,001 - \$50,000	
Spouse's Wells Fargo IRA ⇒	SP	11/29/2023	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Blackstone Inc. Common Stock (BX) [ST]					
Spouse's Wells Fargo IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST]	SP	11/29/2023	P	\$15,001 - \$50,000	
Spouse's Wells Fargo IRA ⇒ Valero Energy Corporation Common Stock (VLO) [ST]	SP	11/29/2023	P	\$15,001 - \$50,000	
Stellantis N.V. Common Shares (STLA) [ST]	SP	08/22/2023	P	\$15,001 - \$50,000	
Stellantis N.V. Common Shares (STLA) [ST]	SP	09/15/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Stryker Corporation (SYK) [ST]	SP	01/3/2023	S	\$100,001 - \$250,000	<input type="checkbox"/>
Stryker Corporation (SYK) [ST]		02/24/2023	P	\$1,001 - \$15,000	
Stryker Corporation (SYK) [ST]		03/17/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Texas Instruments Incorporated (TXN) [ST]		04/5/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: sale of 29 shares					
The Cigna Group (CI) [ST]		02/24/2023	P	\$15,001 - \$50,000	
The Cigna Group (CI) [ST]		07/21/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Undeveloped Property [RP]	JT	09/15/2023	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LOCATION: Pilot Point, TX, US					
United Parcel Service, Inc. (UPS) [ST]		08/9/2023	P	\$15,001 - \$50,000	
United Parcel Service, Inc. (UPS) [ST]	SP	08/9/2023	P	\$15,001 - \$50,000	
United Parcel Service, Inc. (UPS) [ST]		12/14/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
United Parcel Service, Inc. (UPS) [ST]		12/14/2023	P	\$1,001 - \$15,000	
United Parcel Service, Inc. (UPS) [ST]	SP	12/15/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
United Parcel Service, Inc. (UPS) [ST]	SP	12/15/2023	P	\$1,001 - \$15,000	
Valero Energy Corporation (VLO) [ST]		12/8/2023	P	\$15,001 - \$50,000	
Walt Disney Company (DIS) [ST]		01/20/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Wells Fargo IRA ⇒ American Funds Growth Fund of America [BA]		01/27/2023	P	\$50,001 - \$100,000	

\* 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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Pennymac Loan Services LLC	06/17/2019	mortgage on Hot Springs, AR	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Member of the Board	University of North Texas Foundation

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2010	Self / World Net Daily	Publishing Contract

## 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**

- Schwab Premier Bank (Cultivar Joint 1753) (Owner: JT)
- Spouse's Wells Fargo IRA (Owner: SP)
- Wells Fargo 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. Michael C. Burgess , 08/13/2024