



Filing ID #10062690

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Eric Burlison  
**Status:** Member  
**State/District:** MO07

## 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?
Ameriprise Roth IRA ⇒ Invesco S&P 500 Pure Value ETF (RPV) [EF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Roth IRA ⇒ Invesco S&P 500 Pure Value ETF (RPV) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Roth IRA ⇒ Invesco S&P 500 Pure Value ETF (RPV) [EF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Roth IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Roth IRA ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Roth IRA ⇒ Schwab Fundamental International Equity ETF (FNDF) [EF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Roth IRA ⇒ Vanguard Russell 1000 Growth ETF (VONG) [EF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Roth IRA ⇒	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Total World Stock Index ETF (VT) [EF]					<input type="checkbox"/>
Ameriprise Roth IRA ⇒ WisdomTree Trust WisdomTree Artificial Intelligence and Innovation Fund (WTAI) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Simple IRA ⇒ Invesco S&P 500 Pure Value ETF (RPV) [EF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Simple IRA ⇒ Vanguard Russell 1000 Growth ETF (VONG) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Simple IRA ⇒ Vanguard Total World Stock Index ETF (VT) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ Schwab Fundamental International Equity ETF (FNDF) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ Vanguard Russell 1000 Growth ETF (VONG) [EF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ Vanguard Total World Stock Index ETF (VT) [EF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ameriprise Traditional IRA ⇒ WisdomTree Trust WisdomTree Artificial Intelligence and Innovation Fund (WTAI) [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Book of Business, 100% Interest [OL]		\$50,001 - \$100,000	Capital Gains	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LOCATION: Springfield / Greene, MO, US DESCRIPTION: Sale of book of business to partner					
Fidelity ⇒ Vanguard 500 Index [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity ⇒ Vanguard Target 2040 [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
MOSERS - Missouri Employee Retirement [DB]		Undetermined	Defined Benefits	None	<input type="checkbox"/>
Rental Home [RP]	JT	\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Springfield, MO, US					

\* 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?
4879 S. Tanager Ave. [RP]	JT	05/19/2023	S	\$250,001 - \$500,000	<input type="checkbox"/>
LOCATION: Battlefield/Greene, MO, US					
DESCRIPTION: Sale of Residence					
Ameriprise Simple IRA ⇒ Invesco S&P 500 Pure Value ETF (RPV) [EF]	SP	Bi-weekly	P	\$1,001 - \$15,000	
Ameriprise Simple IRA ⇒ Vanguard Russell 1000 Growth ETF (VONG) [EF]	SP	Bi-weekly	P	\$1,001 - \$15,000	
Ameriprise Simple IRA ⇒ Vanguard Total World Stock Index ETF (VT) [EF]	SP	Bi-weekly	P	\$1,001 - \$15,000	
Book of Business [OL]		01/1/2023	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
LOCATION: Springfield / Greene, MO, US					
DESCRIPTION: Sale of book of business					

\* 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
Retail Confectioners International	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Truist Bank	1/13/2012	Mortgage on Rental Property	\$10,000 - \$15,000
JT	Regent Bank	December 2022	Current Residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Community Relations Board Member	The United States Federal Medical Prison
COMMENTS: Unpaid	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2022	MOSERS (State of Missouri) & Eric Burlison	Defined Benefit Retirement Pension eligible at age 55 equal to 1/2 of legislative salary, currently at \$36,000/year (=18,000/year)

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

<ul style="list-style-type: none"><li>Ameriprise Roth IRA</li><li>Ameriprise Roth IRA (Owner: SP)</li><li>Ameriprise Simple IRA (Owner: SP)</li><li>Ameriprise Traditional IRA (Owner: SP)</li><li>Fidelity</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. Eric Burlison , 08/13/2024