Filing ID #10066141

Financial Disclosure Report

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

Filer Information

Name: Hon. Garland "Andy" Barr
Status: Member
State/District: KY06

Filing Information

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 08/11/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Chase Checkings/Savings Account [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	
Fifth Third Bank [BA]		$1,001 - $15,000	Interest	$1 - $200	
Forcht Bank [BA]		$1,001 - $15,000	Interest	$1 - $200	
GS Savings Account [BA]	SP	$100,001 - $250,000	Interest	$2,501 - $5,000	
KeyCorp (KEY) [ST]		$1,001 - $15,000	Dividends	$201 - $1,000	
KY Employees Retirement System [DB]		$15,001 - $50,000	None		
Live Oak CD [BA]	SP	$15,001 - $50,000	Interest	$201 - $1,000	
NW Mutual 65 Life [WU]		$1,001 - $15,000	None		
NW Mutual 65 Life Supplemental [WU]		$1,001 - $15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
NW Mutual 90 Whole Life [WU]		$1,001 - $15,000	None		☐
Pfizer, Inc. (PFE) [ST]		$1,001 - $15,000	Dividends	$201 - $1,000	☐
VUSXX Vanguard Money Market [BA]	SP	$100,001 - $250,000	Interest	$5,001 - $15,000	☐
Baird After-tax holdings ⇒ Baird Money Market and Savings [BA]		$15,001 - $50,000	Interest	$1 - $200	☐
Baird After-tax holdings ⇒ Eleanor Barr Trust [BA]		$50,001 - $100,000	Dividends, Interest	$1,001 - $2,500	☐
Baird After-tax holdings ⇒ First Trust Cap Strength [EF]		$15,001 - $50,000	Dividends, Interest	$201 - $1,000	☐
Baird After-tax holdings ⇒ Mary Clay Barr Trust [BA]		$50,001 - $100,000	Dividends, Interest	$1,001 - $2,500	☐
Baird After-tax holdings ⇒ SPDR S&P 500 ETF [EF]		$50,001 - $100,000	Dividends, Interest	$1,001 - $2,500	☐
Baird After-tax holdings ⇒ Vanguard Russell 1000 Growth Index FD ETF [EF]		$50,001 - $100,000	Dividends, Interest	$1,001 - $2,500	☐
Eleanor Barr 529 ⇒ The Growth Fund of America 529A [MF]		$100,001 - $250,000	Tax-Deferred		☐
Garland Barr IRA ⇒ Cash (HSBC Bank USA) [BA]		$1 - $1,000	Tax-Deferred		☐
Garland Barr IRA ⇒ iShares Russell 1000 Growth ETF (IWF) [EF] DESCRIPTION: purchase/rollover		$50,001 - $100,000	Tax-Deferred		☑
Garland Barr IRA ⇒ iShares Russell 1000 Value ETF (IWD) [EF] DESCRIPTION: rollover/purchase		$50,001 - $100,000	Tax-Deferred		☑
Garland Barr IRA ⇒ iShares Russell 2000 ETF (IWM) [EF] DESCRIPTION: Rollover/purchase		$15,001 - $50,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Garland Barr IRA ⇒ iShares Russell Mid-Cap ETF (IWR) [EF] DESCRIPTION: rollover/purchase		$15,001 - $50,000	Tax-Deferred		☑
Garland Barr IRA ⇒ SPDR S&P 500 (SPY) [EF] DESCRIPTION: Purchase/rollover		$50,001 - $100,000	Tax-Deferred		☑
John Hancock IRA ⇒ John Hancock Disciplined Value International Fund Class A (JDIBX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
John Hancock IRA ⇒ John Hancock Funds II Blue Chip Growth Fund Class A (JBGAX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		☐
John Hancock IRA ⇒ John Hancock Funds II Multimanager 2050 Lifetime Portfolio Class A (JLKAX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		☐
Mary Clay Barr 529 ⇒ New Perspective Fund 529A [MF]		$50,001 - $100,000	Tax-Deferred		☐
Mary Clay Barr 529 ⇒ The Growth Fund of America 529A [MF]		$15,001 - $50,000	Tax-Deferred		☐
NW Mutual ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]		$15,001 - $50,000	Dividends, Interest	$201 - $1,000	☐
NW Mutual ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		$1,001 - $15,000	Dividends, Interest	$1 - $200	☐
NW Mutual ⇒ iShares Inc Msci Eurzone ETF [EF]		$1,001 - $15,000	Dividends, Interest	$1 - $200	☐
NW Mutual ⇒ iShares Inc MSCI Frontier [EF]		$1,001 - $15,000	Dividends, Interest	$201 - $1,000	☐
NW Mutual ⇒ Ishares TR National MUN ETF [EF]		$1,001 - $15,000	Dividends, Interest	$201 - $1,000	☐
NW Mutual ⇒ NW Mutual Money Market [BA]		$1,001 - $15,000	Interest	$1 - $200	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
NW Mutual ⇒ SPDR S&P 500 (SPY) [MF]		$15,001 - $50,000	Dividends, Interest	$201 - $1,000	
NW Mutual ⇒ SPDR SER TR Nuveen BLMBRG ST MBF [EF]		$15,001 - $50,000	Dividends, Interest	$201 - $1,000	
NW Mutual ⇒ SPDR SER TR Nuveen BRC MUNIC [EF]		$1,001 - $15,000	Dividends, Interest	$201 - $1,000	
NW Mutual ⇒ SPDR Trust SPDR S&P 500 Value ETF [EF]		$15,001 - $50,000	Dividends, Interest	$201 - $1,000	
NW Mutual ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF] Description: purchase		$1,001 - $15,000	Dividends	$201 - $1,000	✓
NW Mutual ⇒ Hale Barr 529 ⇒ American Funds College 2039 Fund - 529A [5F] Location: KY Description: purchase		$1,001 - $15,000	Tax-Deferred		✓
TIAA Brokerage Account ⇒ Blackstone Mortgage Trust, Inc. Common Stock (BXMT) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
TIAA Brokerage Account ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
TIAA Brokerage Account ⇒ SPDR Dow Jones Industrial Average ETF (DIA) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
TIAA Brokerage Account ⇒ SPDR S&P 500 (SPY) [EF]	SP	$15,001 - $50,000	Tax-Deferred		
TIAA Brokerage Account ⇒ TIAA Brokerage Sweep Account [BA]	SP	$1 - $1,000	Tax-Deferred		
TIAA Brokerage Account ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	$1,001 - $15,000	Tax-Deferred		
Wells Fargo Advisors ⇒ ARK Innovative ARKK [EF]		$15,001 - $50,000	Dividends	$1 - $200	
Wells Fargo Advisors ⇒		$1,001 - $15,000	Dividends	$1 - $200	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Energy Select Sector SPDR Fund XLE [EF]					
Wells Fargo Advisors ⇒ First Trust DJ Internet Index Fund FDN [EF]		$1,001 - $15,000	Dividends	$1 - $200	
Wells Fargo Advisors ⇒ First Trust NASDQ Bank FTXO ETF [EF]		$1,001 - $15,000	Dividends	$1 - $200	
Wells Fargo Advisors ⇒ First Trust Small Cap Growth AlphaDex FYC [EF]		$1,001 - $15,000	Dividends	$1 - $200	
Wells Fargo Advisors ⇒ Invesco Senior Loan BKLN [EF]		$1,001 - $15,000	Dividends	$1 - $200	
Wells Fargo Advisors ⇒ iShares Core S&P 500 IVV [EF]		$1,001 - $15,000	Dividends	$1 - $200	
Wells Fargo Advisors ⇒ iShares Micro Cap IWC [EF]		$1,001 - $15,000	Dividends	$1 - $200	
Wells Fargo Advisors ⇒ SPDR S&P Metals & Mining XME ETF [EF]		$1,001 - $15,000	Dividends	$1 - $200	
Wells Fargo Advisors ⇒ SPDR S&P Regional Banking ETF (KRE) [EF] Description: Purchase		$1,001 - $15,000	Dividends	$1 - $200	✓

* 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?
Garland Barr IRA ⇒ iShares Russell 2000 ETF (IWM) [EF] Description: rollover		01/07/2024	P	$15,001 - $50,000	
Garland Barr IRA ⇒ iShares Russell 1000 Value ETF (IWD) [EF] Description: rollover		01/07/2024	P	$50,001 - $100,000	
Garland Barr IRA ⇒ iShares Russell 1000 Growth ETF (IWF) [EF]		01/07/2024	P	$50,001 - $100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Description: rollover					
Garland Barr IRA ⇒ iShares Russell Mid-Cap ETF (IWR) [EF] Description: rollover		01/07/2024	P	$15,001 - $50,000	
Garland Barr IRA ⇒ SPDR S&P 500 (SPY) [EF] Description: rollover		01/07/2024	P	$50,001 - $100,000	
5th 3rd Bank Acct [BA]	SP	09/18/2024	S	$1,001 - $15,000	☐
Baird After-tax holdings ⇒ SPDR Portfolio S&P 600 Small Cap ETF (SPSM) [EF]		11/01/2024	S	$15,001 - $50,000	☐
Baird After-tax holdings ⇒ SPDR S&P MidCap 400 ETF Trust (MDY) [EF]		11/01/2024	S	$15,001 - $50,000	☐
Baird After-tax holdings ⇒ Vanguard Intermediate-Term Bond ETF (BIV) [EF]		11/01/2025	S	$50,001 - $100,000	☐
Baird After-tax holdings ⇒ Vanguard Treasury Money Market [BA]		11/01/2024	S	$15,001 - $50,000	☐
Baird After-tax holdings ⇒ Virtus Equity & Convertible Income Fund (XNIEX) [MF]		11/01/2024	S	$15,001 - $50,000	☐
Baird After-tax holdings ⇒ VUSXX Vanguard Treasury Money Market [GS]		11/01/2024	S	$1,001 - $15,000	☐
NW Mutual ⇒ Hale Barr 529 ⇒ American Funds College 2039 Fund - 529A [5F] Location: KY		01/15/2024	P	$1,001 - $15,000	
NW Mutual ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]		01/15/2024	P	$15,001 - $50,000	
TLS Targeted 2050 ⇒ Columbia Emerging Markets Fund Class I3 (CEKYX) [MF] Description: rollover to IRA	SP	07/01/2024	S	$500.00	☐
TLS Targeted 2050 ⇒ Invesco Short Duration Inflation Protected Fund Cl R5 (ALMIX)	SP	07/01/2024	S	$500.00	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
[MF] DESCRIPTION: rollover					
TLS Targeted 2050 ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF] DESCRIPTION: rollover	SP	07/01/2024	S	$1,001 - $15,000	☐
TLS Targeted 2050 ⇒ Vanguard International Explorer Fund (VINEX) [MF] DESCRIPTION: rollover	SP	07/01/2024	S	$1,001 - $15,000	☐
TLS Targeted 2050 ⇒ Vanguard Mid-Cap Index Fund Admiral Shares (VIMAX) [MF] DESCRIPTION: rollover	SP	07/01/2024	S	$500.00	☐
TLS Targeted 2050 ⇒ Vanguard Mid-Cap Value Index Fd Admiral (VMVAX) [MF] DESCRIPTION: rollover	SP	07/01/2024	S	$600.00	☐
TLS Targeted 2050 ⇒ Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF] DESCRIPTION: rollover	SP	07/01/2024	S	$600.00	☐
TLS Targeted 2050 ⇒ Vanguard Value Index Fd Admiral Shs (VVIAX) [MF] DESCRIPTION: rollover	SP	07/01/2024	S	$1,001 - $15,000	☐
Wells Fargo Advisors ⇒ First Trust Amex Biotech Index Fund (FBT) [EF]		03/11/2024	S	$1,001 - $15,000	☐
Wells Fargo Advisors ⇒ iShares 0-5 Year TIPS Bond ETF (STIP) [EF]		03/11/2024	S	$1,001 - $15,000	☐
Wells Fargo Advisors ⇒ iShares Russell Mid-cap Value ETF (IWS) [EF]		03/11/2024	S	$1,001 - $15,000	☐
Wells Fargo Advisors ⇒ iShares Russell Midcap Growth ETF (IWP) [EF]		03/11/2024	S	$1,001 - $15,000	☐
Wells Fargo Advisors ⇒ iShares TIPS Bond ETF (TIP) [EF]		03/11/2024	S	$1,001 - $15,000	☐
Wells Fargo Advisors ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]		03/11/2024	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?

* 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	Forcht Bank	December 2024	Mortgage on personal residence	$500,001 - $1,000,000

Schedule E: Positions

None disclosed.

Schedule F: Agreements

Date	Parties To	Terms of Agreement
January 2004	KY employees Retirement System	KY state pension, cash value approximately $30,000 (2024), benefits payable beginning 8/1/38

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?
Ripon Society	11/07/2024	11/12/2024	Lexington, KY - Vienna, Austria - Washington, DC	0	✓	✓	✓

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

- Garland Barr IRA
- Eleanor Barr 529
  Location: KY
- Mary Clay Barr 529
  Location: KY
- Baird After-tax holdings
  Location: KY, US
- NW Mutual
  Location: US
- Wells Fargo Advisors
  Location: Louisville, KY, US
- TLS Targeted 2050 (Owner: SP)
- TIAA Brokerage Account (Owner: SP)
- John Hancock IRA (Owner: SP)
- NW Mutual ⇒ Hale Barr 529
  Location: KY

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. Garland "Andy" Barr , 08/11/2025