



Filing ID #10063293

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2025  
**Filing Date:** 02/2/2025

## 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         | None           |                     | <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      | \$1,001 - \$2,500   | <input type="checkbox"/> |
| Fidelity Cash Reserves [BA]   | JT    | \$1 - \$1,000         | Dividends      | \$1 - \$200         | <input type="checkbox"/> |
| Fidelity Contrafund [MF]  | JT    | \$100,001 - \$250,000 | Dividends      | \$15,001 - \$50,000 | <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]                                      |       | Undetermined            | royalty income | None            | <input type="checkbox"/> |
| LOCATION: multiple counties, TX, US                      |       |                         |                |                 |                          |
| DESCRIPTION: Dale Operating Gas Lease                    |       |                         |                |                 |                          |
| Mineral Rights [RP]                                      |       | Undetermined            | royalty income | None            | <input type="checkbox"/> |
| LOCATION: multiple counties, TX, US                      |       |                         |                |                 |                          |
| DESCRIPTION: Titan Operating Gas Lease                   |       |                         |                |                 |                          |
| Mineral Rights [RP]                                      | JT    | Undetermined            | royalty income | None            | <input type="checkbox"/> |
| LOCATION: multiple counties, TX, US                      |       |                         |                |                 |                          |
| DESCRIPTION: Vantage Energy Operating Gas Lease.         |       |                         |                |                 |                          |
| Non Investment Residence [RP]                            | JT    | \$100,001 - \$250,000   | None           |                 | <input type="checkbox"/> |
| LOCATION: Fort Worth, TX, US                             |       |                         |                |                 |                          |
| Non Investment Residence [RP]                            | JT    | \$500,001 - \$1,000,000 | None           |                 | <input type="checkbox"/> |
| LOCATION: Hot Springs, AR, US                            |       |                         |                |                 |                          |
| 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]  | JT    | \$50,001 - \$100,000    | Interest       | \$201 - \$1,000   | <input type="checkbox"/> |
| DESCRIPTION: checking account  |       |                         |                |                   |                          |
| Primary Residence [RP]   | JT    | \$500,001 - \$1,000,000 | None           |                   | <input type="checkbox"/> |
| LOCATION: Little Elm, TX, US   |       |                         |                |                   |                          |
| 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]  |       | \$1 - \$1,000           | Interest       | \$1 - \$200       | <input type="checkbox"/> |
| DESCRIPTION: Money Market  |       |                         |                |                   |                          |
| 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 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 type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ ETF Opportunities Trust Cultivar ETF (CVAR) [EF]               | JT    | \$50,001 - \$100,000    | Dividends      | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ First Eagle Overseas Fund Class I (SGOIX) [MF]                 | JT    | \$15,001 - \$50,000     | Dividends      | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ Gateway Fund Class Y (GTEYX) [MF]                              | JT    | \$15,001 - \$50,000     | Dividends      | \$1 - \$200       | <input type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ Hussman Strategic Growth Fd (HSGFX) [MF]                       | JT    | \$15,001 - \$50,000     | Dividends      | \$201 - \$1,000   | <input 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 type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]                  | JT    | None                    | Dividends      | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]                | JT    | \$15,001 - \$50,000     | Dividends      | \$1,001 - \$2,500 | <input type="checkbox"/> |

| Asset  | Owner | Value of Asset          | Income Type(s) | Income              | Tx. > \$1,000?           |
|--|-------|-------------------------|----------------|---------------------|--------------------------|
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares Global Timber & Forestry ETF (WOOD) [EF]                 | JT    | \$15,001 - \$50,000     | Dividends      | \$1 - \$200         | <input 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 type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ Loomis Sayles Funds - Global Bond Fund Instl Class (LSGBX) [MF]  | JT    | \$15,001 - \$50,000     | Dividends      | None                | <input 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 type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) [BA]   | JT    | \$1,001 - \$15,000      | Interest       | None                | <input type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]                   | JT    | \$1,001 - \$15,000      | Dividends      | \$1 - \$200         | <input type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]                         | JT    | None                    | Dividends      | \$201 - \$1,000     | <input type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ Thompson Bond Fund (THOPX) [MF]                                  | JT    | \$15,001 - \$50,000     | Dividends      | \$2,501 - \$5,000   | <input type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ VanEck Gold Miners ETF (GDX) [EF]                                | JT    | \$15,001 - \$50,000     | Dividends      | \$201 - \$1,000     | <input type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ VanEck Natural Resources ETF (HAP) [EF]                          | JT    | \$15,001 - \$50,000     | Dividends      | \$201 - \$1,000     | <input type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ Wasatch-Hoisington U.S. Treasury Fund (WHOSX) [MF]               | JT    | \$15,001 - \$50,000     | Dividends      | None                | <input type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 3289) [BA]   | JT    | \$1,001 - \$15,000      | Interest       | \$1 - \$200         | <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 ⇒   | SP    | \$1,001 - \$15,000      | Tax-Deferred   |                     | <input type="checkbox"/> |

| Asset  | Owner | Value of Asset       | Income Type(s) | Income       | Tx. > \$1,000?                      |
|--|-------|----------------------|----------------|--------------|-------------------------------------|
| Advance Auto Parts Inc. (AAP) [ST]   |       |                      |                |              |                                     |
| Spouse's Wells Fargo IRA ⇒ Advanced Micro Devices, Inc. (AMD) [ST]                                       | SP    | None                 |                | Tax-Deferred | <input checked="" type="checkbox"/> |
| Spouse's Wells Fargo IRA ⇒ Allspring Government Money Market Class I (GVIXX) [MF]                        | SP    | \$50,001 - \$100,000 |                | Tax-Deferred | <input 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    | None                 |                | Tax-Deferred | <input checked="" type="checkbox"/> |
| Spouse's Wells Fargo IRA ⇒ Best Buy Co., Inc. Common Stock (BBY) [ST]                                    | SP    | None                 |                | Tax-Deferred | <input checked="" type="checkbox"/> |
| Spouse's Wells Fargo IRA ⇒ Blackstone Inc. Common Stock (BX) [ST]  | SP    | None                 |                | Tax-Deferred | <input checked="" type="checkbox"/> |
| Spouse's Wells Fargo IRA ⇒ Chemours Company (CC) [ST]  | SP    | \$1,001 - \$15,000   |                | Tax-Deferred | <input 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 ⇒ GRAIL, Inc. - Common Stock (GRAL) [ST]  | SP    | \$1 - \$1,000        |                | Tax-Deferred | <input type="checkbox"/>            |
| Spouse's Wells Fargo IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST]  | SP    | None                 |                | 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 ⇒ Royal Bank Of Canada Common Stock (RY) [ST]                                   | SP    | None                 |                | Tax-Deferred | <input checked="" type="checkbox"/> |
| Spouse's Wells Fargo IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]                           | SP    | None                 |                | Tax-Deferred | <input checked="" type="checkbox"/> |
| Spouse's Wells Fargo IRA ⇒ United States Treasury Bill [GS]  | SP    | None                 |                | None         | <input type="checkbox"/>            |

| Asset   | Owner | Value of Asset        | Income Type(s) | Income            | Tx. > \$1,000?                      |
|---|-------|-----------------------|----------------|-------------------|-------------------------------------|
| Spouse's Wells Fargo IRA ⇒ Valero Energy Corporation Common Stock (VLO) [ST]                    | SP    | None                  | Tax-Deferred   |                   | <input checked="" type="checkbox"/> |
| Spouse's Wells Fargo IRA ⇒ Viatris 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]   | JT    | \$1,001 - \$15,000    | None           |                   | <input type="checkbox"/>            |
| LOCATION: Hot Springs Village, AR, US   |       |                       |                |                   |                                     |
| Victorias Secret & Co. (VSCO) [ST]  |       | \$1 - \$1,000         | Dividends      | None              | <input type="checkbox"/>            |
| Wells Fargo Bank Deposit Sweep Combined [BA]  | JT    | \$100,001 - \$250,000 | Interest       | \$1,001 - \$2,500 | <input type="checkbox"/>            |
| Wells Fargo IRA ⇒ AbbVie Inc. (ABBV) [ST]   |       | None                  | Tax-Deferred   |                   | <input checked="" type="checkbox"/> |
| Wells Fargo IRA ⇒ Advance Auto Parts Inc. (AAP) [ST]  |       | \$1,001 - \$15,000    | Tax-Deferred   |                   | <input type="checkbox"/>            |
| Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX) [ST] |       | \$1,001 - \$15,000    | Tax-Deferred   |                   | <input type="checkbox"/>            |
| Wells Fargo IRA ⇒ American Funds Growth Fund of America [BA]                                    |       | \$100,001 - \$250,000 | Tax-Deferred   |                   | <input type="checkbox"/>            |
| Wells Fargo IRA ⇒ AT&T Inc. (T) [ST]  |       | \$1,001 - \$15,000    | Tax-Deferred   |                   | <input type="checkbox"/>            |
| Wells Fargo IRA ⇒ Blackstone Inc. Common Stock (BX) [ST]  |       | None                  | Tax-Deferred   |                   | <input checked="" type="checkbox"/> |
| Wells Fargo IRA ⇒ Chemours Company (CC) [ST]  |       | \$1,001 - \$15,000    | Tax-Deferred   |                   | <input type="checkbox"/>            |
| Wells Fargo IRA ⇒ Cigna Corporation (CI) [ST]   |       | None                  | Tax-Deferred   |                   | <input type="checkbox"/>            |
| Wells Fargo IRA ⇒   |       | \$1,001 - \$15,000    | Tax-Deferred   |                   | <input type="checkbox"/>            |

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

| Asset   | Owner | Value of Asset     | Income Type(s) | Income       | Tx. > \$1,000?                      |
|---|-------|--------------------|----------------|--------------|-------------------------------------|
| Wells Fargo IRA ⇒<br>Phillips 66 Common Stock (PSX) [ST]                      |       | None               |                | Tax-Deferred | <input type="checkbox"/>            |
| Wells Fargo IRA ⇒<br>Southwest Airlines Company (LUV) [ST]                    |       | \$1,001 - \$15,000 |                | Tax-Deferred | <input type="checkbox"/>            |
| Wells Fargo IRA ⇒<br>United Parcel Service, Inc. Common Stock (UPS) [ST]      |       | \$1,001 - \$15,000 |                | Tax-Deferred | <input type="checkbox"/>            |
| Wells Fargo IRA ⇒<br>Valero Energy Corporation Common Stock (VLO) [ST]        |       | None               |                | Tax-Deferred | <input checked="" type="checkbox"/> |
| Wells Fargo IRA ⇒<br>Walgreens Boots Alliance, Inc. - Common Stock (WBA) [ST] |       | \$1,001 - \$15,000 |                | Tax-Deferred | <input checked="" type="checkbox"/> |
| Wells Fargo IRA ⇒<br>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]                              |       | \$1,001 - \$15,000 |                | 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. Common Stock (ABBV) [ST]       |       | 04/10/2024 | S        | \$1,001 - \$15,000  | <input type="checkbox"/> |
| Advanced Micro Devices, Inc. (AMD) [ST]    | SP    | 01/2/2024  | S        | \$1,001 - \$15,000  | <input type="checkbox"/> |
| Amgen Inc. (AMGN) [ST]                     | SP    | 01/2/2024  | S        | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Best Buy Co., Inc. Common Stock (BBY) [ST] |       | 02/23/2024 | S        | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Best Buy Co., Inc. Common Stock (BBY) [ST] | SP    | 02/26/2024 | S        | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Blackstone Inc. (BX) [ST]                  | SP    | 01/2/2024  | S        | \$15,001 - \$50,000 | <input type="checkbox"/> |

| Asset  | Owner | Date       | Tx. Type    | Amount              | Cap. Gains > \$200?                 |
|--|-------|------------|-------------|---------------------|-------------------------------------|
| Blackstone Inc. (BX) [ST]  |       | 01/12/2024 | S           | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Exxon Mobil Corporation (XOM) [ST]   | SP    | 01/2/2024  | P           | \$15,001 - \$50,000 |                                     |
| Exxon Mobil Corporation Common Stock (XOM) [ST]  | SP    | 03/11/2024 | S           | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Fidelity Contra Fund (FCNTX) [MF]  |       | 04/8/2024  | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |
| Illumina, Inc. (ILMN) [ST]   | SP    | 01/2/2024  | S (partial) | \$1,001 - \$15,000  | <input type="checkbox"/>            |
| Illumina, Inc. (ILMN) [ST]   | SP    | 01/2/2024  | P           | \$15,001 - \$50,000 |                                     |
| Illumina, Inc. (ILMN) [ST]   |       | 01/2/2024  | P           | \$1,001 - \$15,000  |                                     |
| Illumina, Inc. - Common Stock (ILMN) [ST]  |       | 02/9/2024  | S (partial) | \$1,001 - \$15,000  | <input type="checkbox"/>            |
| Illumina, Inc. - Common Stock (ILMN) [ST]  |       | 02/12/2024 | S           | \$1,001 - \$15,000  | <input type="checkbox"/>            |
| DESCRIPTION: The terms of the call are a strike price of \$138, and an expiration of 03/08/2024. |       |            |             |                     |                                     |
| Illumina, Inc. - Common Stock (ILMN) [ST]  |       | 02/12/2024 | P           | \$15,001 - \$50,000 |                                     |
| Illumina, Inc. - Common Stock (ILMN) [ST]  | SP    | 02/12/2024 | S (partial) | \$1,001 - \$15,000  | <input type="checkbox"/>            |
| Illumina, Inc. - Common Stock (ILMN) [ST]  |       | 03/11/2024 | S (partial) | \$1,001 - \$15,000  | <input type="checkbox"/>            |
| Illumina, Inc. - Common Stock (ILMN) [ST]  | SP    | 03/11/2024 | S (partial) | \$1,001 - \$15,000  | <input type="checkbox"/>            |
| Illumina, Inc. - Common Stock (ILMN) [ST]  | SP    | 09/3/2024  | S           | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| Illumina, Inc. - Common Stock (ILMN) [ST]  |       | 08/30/2024 | S           | \$15,001 - \$50,000 | <input type="checkbox"/>            |
| DESCRIPTION: sale of 200 shares  |       |            |             |                     |                                     |
| International Business Machines Corporation Common Stock (IBM) [ST]                              |       | 04/10/2024 | S (partial) | \$1,001 - \$15,000  | <input type="checkbox"/>            |

| Asset  | Owner | Date       | Tx. Type    | Amount               | Cap. Gains > \$200?                 |
|--|-------|------------|-------------|----------------------|-------------------------------------|
| iShares International Inflation-Linked Bond ETF (ITIP) [ST]                                    |       | 04/10/2024 | S           | \$1,001 - \$15,000   | <input type="checkbox"/>            |
| Merck & Company, Inc. Common Stock (MRK) [ST]  |       | 04/10/2024 | S           | \$1,001 - \$15,000   | <input type="checkbox"/>            |
| Palo Alto Networks, Inc. (PANW) [ST]   | SP    | 01/2/2024  | S           | \$15,001 - \$50,000  | <input type="checkbox"/>            |
| Palo Alto Networks, Inc. (PANW) [ST]   |       | 02/9/2024  | S           | \$15,001 - \$50,000  | <input type="checkbox"/>            |
| Royal Bank Of Canada (RY) [ST]   | SP    | 01/10/2024 | P           | \$1,001 - \$15,000   |                                     |
| Royal Bank Of Canada (RY) [ST]   | SP    | 01/10/2024 | S           | \$1,001 - \$15,000   | <input type="checkbox"/>            |
| Royal Bank Of Canada Common Stock (RY) [ST]  | SP    | 07/16/2024 | S (partial) | \$1,001 - \$15,000   | <input type="checkbox"/>            |
| Royal Bank Of Canada Common Stock (RY) [ST]  |       | 07/16/2024 | P           | \$1,001 - \$15,000   |                                     |
| Royal Bank Of Canada Common Stock (RY) [ST]  | SP    | 07/25/2024 | S           | \$15,001 - \$50,000  | <input type="checkbox"/>            |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]      | JT    | 12/31/2024 | S           | \$15,001 - \$50,000  | <input checked="" type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]     | JT    | 09/9/2024  | P           | \$1,001 - \$15,000   |                                     |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ SPDR S&P Regional Banking ETF (KRE) [EF]           | JT    | 08/27/2024 | S           | \$1,001 - \$15,000   | <input checked="" type="checkbox"/> |
| Schwab Premier Bank (Cultivar Joint 1753) ⇒ Wasatch-Hoisington U.S. Treasury Fund (WHOSX) [MF] | JT    | 12/31/2024 | P           | \$15,001 - \$50,000  |                                     |
| Spouse's Wells Fargo IRA ⇒ Allspring Government Money Market Class I (GVIXX) [MF]              | SP    | 05/14/2024 | P           | \$50,001 - \$100,000 |                                     |
| Spouse's Wells Fargo IRA ⇒ United States Treasury Bill [GS]                                    | SP    | 05/14/2024 | P           | \$50,001 - \$100,000 |                                     |
| Spouse's Wells Fargo IRA ⇒ United States Treasury Bill [GS]                                    | SP    | 08/15/2024 | S           | \$50,001 - \$100,000 | <input type="checkbox"/>            |

| Asset   | Owner | Date       | Tx. Type    | Amount              | Cap. Gains > \$200?      |
|---|-------|------------|-------------|---------------------|--------------------------|
| United Parcel Service, Inc. Common Stock (UPS) [ST]                           | SP    | 07/22/2024 | S           | \$1,001 - \$15,000  | <input type="checkbox"/> |
| Valero Energy Corporation (VLO) [ST]  | SP    | 01/2/2024  | S           | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Valero Energy Corporation (VLO) [ST]  |       | 01/12/2024 | S           | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Walgreens Boots Alliance, Inc. - Common Stock (WBA) [ST]                      |       | 03/1/2024  | S (partial) | \$1,001 - \$15,000  | <input type="checkbox"/> |
| Wells Fargo IRA ⇒<br>Walgreens Boots Alliance, Inc. - Common Stock (WBA) [ST] |       | 01/18/2024 | P           | \$15,001 - \$50,000 |                          |

\* 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 , 02/2/2025