



Filing ID #10081366

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Morgan Joe Luttrell
Status: Member
State/District: TXo8

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/13/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alphabet Inc. - Class A (GOOGL) [ST]	JT	\$1,001 - \$15,000	None		☐
Fidelity Wise Origin Bitcoin Fund (FBTC) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
iShares Core S&P U.S. Growth ETF (IUSG) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
iShares Core S&P U.S. Value ETF (IUSV) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
MERRILL LYNCH SAVINGS [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	☐
State Street Materials Select Sector SPDR ETF (XLB) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
State Street Real Estate Select Sector SPDR ETF (XLRE) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
USAA 529 Educ. Savings Plan - Age-based 9-11: Moderate portfolio [5F]	DC	\$15,001 - \$50,000	Tax-Deferred		☐
LOCATION: TX					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
USAA Bank Account [BA]		\$1,001 - \$15,000	None		☐
USAA Bank Account- Savings [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	☐
Vanguard FTSE Developed Markets ETF (VEA) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Vanguard FTSE Emerging Markets ETF (VWO) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Vanguard Mortgage-Backed Securities Index Fund (VMBS) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Vanguard Russell 2000 ETF (VTWO) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Vanguard Russell 2000 ETF (VTWO) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☐
Vanguard Total Bond Market ETF (BND) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Dependent Child (FBO) College Savings Plan ⇒ VCSP College America [OT]	DC	\$15,001 - \$50,000	Tax-Deferred		☐
DESCRIPTION: Bought in 2024					
Gunner Luttrell Roth IRA ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$1,001 - \$15,000	Tax-Deferred		☐
LabCorp 401(k) through Fidelity ⇒ Fidelity International Discovery (FIGRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
LabCorp 401(k) through Fidelity ⇒ JPMorgan Equity Income Fund R6 (OIEJX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
LabCorp 401(k) through Fidelity ⇒ Loomis Sayles Small Cap Growth Fd Cl N (LSSNX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
LabCorp 401(k) through Fidelity ⇒ Northern Trust ACWI EX-US IMI 4 [OT]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
DESCRIPTION: Excepted Investment Fund (EIF)					
LabCorp 401(k) through Fidelity ⇒ Northern Trust Collective S&P 500 Index Fund - Non-Lending -	SP	\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Tier 4 [OT]					
DESCRIPTION: Excepted Investment Fund (EIF)					
LabCorp 401(k) through Fidelity ⇒ Northern Trust Extended Equity Market Index Fund [OT]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
DESCRIPTION: Excepted Investment Fund (EIF)					
LabCorp 401(k) through Fidelity ⇒ Victory Sycamore Small Company Opportunity CL A (SSGSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Lincoln Luttrell IRA ⇒ SPDR Portfolio S&P 500 ETF (SPLG) [EF]	DC	\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ CASH [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Communication Services Select Sector SPDR Fund (XLC) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Consumer Staples Select Sector SPDR Fund (XLP) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Energy Select Sector SPDR Fund (XLE) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Health Care Select Sector SPDR Fund (XLV) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Industrial Select Sector SPDR Fund (XLI) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Invesco Variable Rate Preferred ETF (VRP) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares Fallen Angels USD Bond ETF (FALN) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares Inc iShares MSCI Brazil ETF (EWZ) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares Inc iShares MSCI Italy ETF (EWI) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares Inc iShares MSCI Mexico ETF (EWW) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares Inc iShares MSCI South Korea ETF (EWY) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares Inc iShares MSCI Switzerland ETF (EWL) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares MSCI Australia Index Fund (EWA) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares MSCI Canada Index Fund (EWC) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares MSCI China ETF (MCHI) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares MSCI Emerging Markets Min Vol Factor ETF (EEMV) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares MSCI France Index Fund (EWQ) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares MSCI Germany Index Fund (EWG) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares MSCI Hong Kong Index Fund (EWH) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒		\$1 - \$1,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ishares MSCI India ETF (INDA) [EF]					☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares MSCI Japan Index Fund (EWJ) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares MSCI Pacific Ex-Japan Index Fund (EPP) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ iShares MSCI United Kingdom ETF (EWU) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Janus Henderson Mortgage-Backed Securities ETF (JMBS) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Schwab Fundamental Emerging Markets Equity ETF (FNDE) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Schwab Fundamental International Equity ETF (FNDF) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Schwab U.S. TIPs ETF (SCHP) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ SPDR Blackstone Senior Loan ETF (SRLN) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$15,001 - \$50,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ The Consumer Discretionary Select Sector SPDR Fund (XLY) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒		\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Emerging Markets Government Bond ETF (VWOB) [EF]					☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Vanguard FTSE European ETF (VGK) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Vanguard Long-Term Corporate Bond ETF (VCLT) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Vanguard Long-Term Treasury ETF (VGLT) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Vanguard Short-Term Treasury ETF (VGSH) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ WisdomTree Japan Hedged Equity Fund (DXJ) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- CIO Moderate ETF Sector (IRA) ⇒ Xtrackers MSCI Europe Hedged Equity ETF (DBEU) [EF]		\$1 - \$1,000	Tax-Deferred		☐
Morgan Luttrell- Roth IRA ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Morgan Luttrell- Roth IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Spouse - CIO Moderate ETF Core (IRA) ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Spouse - CIO Moderate ETF Core (IRA) ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Spouse - CIO Moderate ETF Core (IRA) ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Core S&P U.S. Value ETF (IUSV) [MF]					
Spouse - CIO Moderate ETF Core (IRA) ⇒ iShares U.S. Treasury Bond ETF (GOVT) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Spouse - CIO Moderate ETF Core (IRA) ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Spouse - CIO Moderate ETF Core (IRA) ⇒ Vanguard Mortgage-Backed Securities ETF (VMBS) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Spouse - CIO Moderate ETF Core (IRA) ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	\$1 - \$1,000	Tax-Deferred		☐

* 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?
iShares Inv. Corp. Bond (USKA) [IR]		12/09/2025	S	\$1,001 - \$15,000	☐
iShares U.S. Treasury (GOVT) [IR]		12/09/2025	S	\$1,001 - \$15,000	☐
VanGuard FTSE Dev. Mkt (VEA) [IR]		12/09/2025	S	\$1,001 - \$15,000	☐
VanGuard Emerging Market (VWO) [IR]		12/09/2025	S	\$1,001 - \$15,000	☐
VanGuard Mtg. Backed Security (VMSS) [IR]		12/09/2025	S	\$1,001 - \$15,000	☐
VanGuard Russell 2000 (VTWO) [IR]		12/09/2025	S	\$1,001 - \$15,000	☐
iShares S&P value [IR]		12/09/2025	S (partial)	\$1,001 - \$15,000	☐
Fidelity Wise Bitcoin (FBTC) [IR]	SP	12/08/2025	P	\$1,001 - \$15,000	
First Financial Bank [OT]		07/01/2025	S	\$15,001 - \$50,000	☐
LOCATION: US					

DESCRIPTION: Closed - finished paying loan off

* 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
	Loan Depo	November 2020	Home Mortgage VA Loan	\$250,001 - \$500,000
JT	Amarillo National Bank	August 2023	Home Equity Loan	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

- Lincoln Luttrell IRA (Owner: DC)
- LabCorp 401(k) through Fidelity (Owner: SP)
- Gunner Luttrell Roth IRA (Owner: DC)
- Dependent Child (FBO) College Savings Plan (Owner: DC)
LOCATION: TX
- Morgan Luttrell- CIO Moderate ETF Sector (IRA)
- Spouse - CIO Moderate ETF Core (IRA) (Owner: SP)
- Morgan Luttrell- Roth 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. Morgan Joe Luttrell , 08/13/2026