



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** William M. Taggart IV  
**Status:** Congressional Candidate  
**State/District:** TX38

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2026  
**Filing Date:** 04/28/2026  
**Period Covered:** 01/01/2025– 03/31/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Express Savings [BA]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$2,501 - \$5,000
Blackstone REIT [RE]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	\$15,001 - \$50,000
DESCRIPTION: REIT					
Merrill Lynch Spouse Acct B [IH]	SP	\$50,001 - \$100,000	Tax-Deferred		
Murphy Pension [DB]		\$250,001 - \$500,000	None		
Personal Checking [BA]		\$1,001 - \$15,000	None		
Charles Schwab Account ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Charles Schwab Account ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200

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Charles Schwab Account ⇒ Murphy Oil Corporation Common Stock (MUR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Chase Managed Spouse Account ⇒ American Funds U.S. Govt Securities C (UGSCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Citigroup Global Markets Holdings Inc. Issuer Callable Fixed Interest Fully Principally Protected No (ABBSPXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Fidelity 500 Index Fund (FXAIX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Fidelity International Index Fund (FSPSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Fidelity Investment Grade Bond Fund (FBNDX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Fidelity Investment Grade Bond Fund (FBNDX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Franklin Multi-Asset Conservative Growth Fund Class A (SBBAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Goldman Sachs Bank USA Autocallable Step Up Point to Point CD ABBEVXX (ABBEVXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ HSBC USA Inc. Capped Dual Directional Buffer Note ABBCAXX (ABBCAXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ iShares MSCI EAFE International Index Fund - Class K (BTMKX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Six Circles Credit Opportunities Fund (CRDOX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Six Circles Global Bond Fund (CGLBX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		

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Chase Managed Spouse Account ⇒ Six Circles International Unconstrained Equity Fund (CIUEX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Six Circles US Unconstrained Equity Fund (CUSUX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Vanguard California Long-Term Tax-Exempt Fund Investor Shares (VCITX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Vanguard Mortgage-Backed Securities Idx Fd Admiral Shs (VMBSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Chase Managed Spouse Account ⇒ Vanguard Total International Bond Index Fd Admiral Shs (VTABX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 0691 ⇒ American Funds High-Income Trust A (AHITX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 0691 ⇒ American Funds New Economy Fund A (ANEFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 0691 ⇒ American Funds SMALLCAP World A (SMCWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 0691 ⇒ Fundamental Investors, Class A Shares (ANCFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 0691 ⇒ The Bond Fund of America, Class A Shares (ABNDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 0691 ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 0691 ⇒ Washington Mutual Invs Fd Cl A Shs (AWSHX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 1768 ⇒		\$15,001 - \$50,000	Tax-Deferred		

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AMCAP Fund, Class A Shares A (AMCPX) [MF]					
Edwin Jones Acct 1768 ⇒ American Balanced Fund, Class A Shs (ABALX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Edwin Jones Acct 1768 ⇒ American Funds EuroPacific Growth A (AEPGX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Edwin Jones Acct 1768 ⇒ American Funds High-Income Trust A (AHITX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 1768 ⇒ American Funds Int Bond Fd of America A (AIBAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 1768 ⇒ American Funds New Economy Fund A (ANEFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Edwin Jones Acct 1768 ⇒ American Funds SMALLCAP World A (SMCWX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Edwin Jones Acct 1768 ⇒ American Mutual Fund Class A Shares (AMRMX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Edwin Jones Acct 1768 ⇒ Fundamental Investors, Class A Shares (ANCFX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Edwin Jones Acct 1768 ⇒ The Bond Fund of America, Class A Shares (ABNDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 9791 ⇒ AMCAP Fund, Class A Shares A (AMCPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 9791 ⇒ American Funds Capital World Growth & Income Fund Class A Shares (CWGIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 9791 ⇒ American Funds Investment Co of America A (AIVSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Edwin Jones Acct 9791 ⇒ American Funds SMALLCAP World A (SMCWX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 9791 ⇒		\$1,001 - \$15,000	Tax-Deferred		

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Capital World Bond Fund, Class A Shares (CWBFX) [MF]					
Edwin Jones Acct 9791 ⇒ New Perspective Fund, Class A Shares (ANWPX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 9791 ⇒ The Bond Fund of America, Class A Shares (ABNDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Edwin Jones Acct 9791 ⇒ The Income Fund of America, Class A Shares (AMECX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Spouse Acct A ⇒ American Balanced Fund, Class A Shs (ABALX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Merrill Lynch Spouse Acct A ⇒ Bank of America NA RASP [IH]	SP	\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch Spouse Acct A ⇒ Emerging Markets Fund Class S (REMSX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Spouse Acct A ⇒ Global Equity Fund Class S (RGESX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Spouse Acct A ⇒ Global Real Estate Securities Fund Class S (RRESX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Spouse Acct A ⇒ International Developed Markets Fund Class S (RINTX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch Spouse Acct A ⇒ U.S. Small Cap Equity Fund Class S (RLESX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Murphy 401k ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
Murphy 401k ⇒ Fidelity Diversified International K6 Fund (FKIDX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Murphy 401k ⇒ Fidelity Freedom 2030 Fund: Class K6 (FGTKX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Murphy 401k ⇒		\$15,001 - \$50,000	Tax-Deferred		

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Fidelity Freedom Income Fund: Class K6 (FYTKX) [MF]					
Murphy 401k ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Murphy 401k ⇒ Fidelity Small Cap Index Fund (FSSNX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Murphy 401k ⇒ Murphy Oil Corporation Common Stock (MUR) [ST]		\$1,000,001 - \$5,000,000	Tax-Deferred		
Murphy 401k ⇒ Murphy USA Inc. Common Stock (MUSA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select IRA ⇒ BlackRock Health Sciences Opportunities Portfolio Class R Shares (BHSRX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Voya Select IRA ⇒ BlackRock High Yield Portfolio - Class R (BHYRX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Voya Select IRA ⇒ Fidelity Advisor Small Cap Fund - Class M (FSCTX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Voya Select IRA ⇒ Invesco Developing Markets Fund Class R (ODVNX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select IRA ⇒ Macquarie Climate Solutions Fund R (IYEFX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select IRA ⇒ PGIM Jennison Financial Services Fund Class R (PSSRX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Voya Select IRA ⇒ PGIM Jennison Utility Fund Class R (JDURX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select IRA ⇒ Voya Large Cap Growth Portfolio Adviser (IEOPX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Voya Select IRA ⇒ Voya Russell Large Cap Value Index Portfolio Service (IRVSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Voya Select IRA ⇒ VY American Century Small-Mid Cap Value Portfolio Initial (IACIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select IRA ⇒ VY JPMorgan Emerging Markets Equity Portfolio Service (IJPIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select IRA ⇒ VY JPMorgan Mid Cap Value Portfolio Initial (JMXI) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Voya Select IRA ⇒ VY Oppenheimer Global Portfolio Adviser (IGMAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Voya Select IRA ⇒ VY T. Rowe Price Capital Appreciation Portfolio Adviser (ITRAX) [MF]		\$1,001 - \$15,000	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 C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Taggart Engineering	Salary	\$83,250.00	\$185,755.00

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Consulting Engineer/Owner	Taggart Engineering
Chief Operating Officer	Cavern Energy Storage, LLC

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
October 2020	Murphy Oil	Pension and Retirement Plan that begins payment at age 65.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Source (Name and Address)	Brief Description of Duties
Beacon Offshore (Covington, LA, US)	Consulting Engineer
COMMENTS: Taggart Engineering performed consulting engineering to Beacon Offshore and received compensation from that.	
Kosmos Energy (Houston, TX, US)	Consulting Engineer
EDG Engineers (New Orleans, LA, US)	Consulting Engineer

## SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"> <li>o Murphy 401k DESCRIPTION: 401K from employment at Murphy Oil</li> <li>o Voya Select IRA DESCRIPTION: Voya Account IRA</li> <li>o Charles Schwab Account</li> <li>o Edwin Jones Acct 0691</li> <li>o Edwin Jones Acct 1768</li> <li>o Edwin Jones Acct 9791</li> <li>o Chase Managed Spouse Account (Owner: SP) DESCRIPTION: Spouse's Retirement Account</li> <li>o Merrill Lynch Spouse Acct A (Owner: SP)</li> </ul>
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## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**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:** William M. Taggart IV, 04/28/2026