



# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2013  
**Filing Date:** 08/1/2014

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
2.5 Acres Harbor South, AR  LOCATION: Harbor South, AR, US DESCRIPTION: Sale	JT	None	Capital Gains	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
26 Acres Glenwood, AR  LOCATION: Glenwood, AR, US DESCRIPTION: Purchase	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
30 Acres 2000 Blackjack, Aubrey, TX  LOCATION: Aubrey, TX, US	JT	\$250,001 - \$500,000	Farming income	None	<input type="checkbox"/>
4637 Ivanhoe Dr., Fort Worth, TX  LOCATION: Fort Worth, TX, US	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
5 Acres Talkeetna, AK, Note Receivable  LOCATION: Talkeetna, AR, US		\$1,001 - \$15,000	Capital Gains, Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Alcatel-Lucent (ALU)		\$1 - \$1,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Airlines Group, Inc. (AAL)		\$1 - \$1,000	None		<input type="checkbox"/>
Cisco Systems, Inc. (CSCO)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Compass Bank	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Dale Operating Gas Lease		None	None		<input type="checkbox"/>
LOCATION: multiple counties, TX, US					
Eaton Vance Ohio Municipal Income Trust Shares of Beneficial Interest (EVO)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Capital Appreciation	JT	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Cash Reserves	JT	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Contrafund	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Export and Multinational	JT	\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity International Discovery	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Sale (partial)					
First Security Bank Account	JT	\$1 - \$1,000	Interest	None	<input type="checkbox"/>
General Electric Company (GE)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Genworth Variable Annuity Plus ⇒ Fidelity VIP Contrafund	SP	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Genworth Variable Annuity Plus ⇒ Genworth Variable Annuity Plus	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Genworth Variable Annuity Plus ⇒ Janus Aspen Institutional Fund	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Global E-Point Inc. DESCRIPTION: out of business		None	None		<input type="checkbox"/>
iShares MSCI Austria Capped Investable Market Index Fund (EWO)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares MSCI Singapore Index Fund (EWS)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares U.S. Telecommunications ETF (IYZ)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
L Brands, Inc. (LB)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
L Brands, Inc. (LB)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Lake Point Medical Realty GP, LLC LOCATION: Lewisville / Denton, TX, US DESCRIPTION: office building		\$1 - \$1,000	partnership income	\$1 - \$200	<input type="checkbox"/>
Lake Point Medical Realty LTD LOCATION: Lewisville / Denton, TX, US DESCRIPTION: Purchase		\$100,001 - \$250,000	partnership income	\$1,001 - \$2,500	<input type="checkbox"/>
MetLife, Inc. (MET)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Microsoft Corporation (MSFT)		\$1,001 - \$15,000	Dividends, Excepted/Blind Trust	\$201 - \$1,000	<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1987-whole		\$50,001 - \$100,000	Tax-Deferred	None	<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1988-whole		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1989-whole		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991b-whole		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Northwest Mutual Life Insurance-65 Life 1991-whole		\$50,001 -	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$100,000			
Northwest Mutual Life Insurance-90 Life 1997-whole	SP	\$50,001 - \$100,000	Tax-Deferred	None	<input type="checkbox"/>
Northwestern Mutual Life Ins Co		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Note Receivable 1: Wise Co Prop, Lewisville, TX		\$1,001 - \$15,000	None		<input type="checkbox"/>
OPKO Health Inc. (OPK)		\$1 - \$1,000	None		<input type="checkbox"/>
Penn West Petroleum Ltd (PWE)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Pfizer, Inc. (PFE)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
PowerShares Dynamic Biotech &Genome (PBE)		\$1 - \$1,000	None		<input type="checkbox"/>
PowerShares Zacks Micro Cap (PZI)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Southwest Airlines Company (LUV)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
SPDR Gold Trust (GLD)		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Alcatel-Lucent (ALU)	SP	\$1 - \$1,000	Tax-Deferred	None	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX)	SP	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Berkshire Hathaway Inc. New (BRK.B)	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ Fidelity Adv. Series - Equity Growth Fund	SP	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Spouse's Wells Fargo IRA ⇒ MFS Series Trust II - Growth FD	SP	None	Capital Gains, Tax-Deferred	None	<input checked="" type="checkbox"/>
Spouse's Wells Fargo IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Pfizer, Inc. (PFE)					
Spouse's Wells Fargo IRA ⇒ Stryker Corporation (SYK)	SP	\$50,001 - \$100,000	Tax-Deferred	None	<input type="checkbox"/>
TD Ameritrade Insured Deposit		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Purchase					
Titan Operating Gas Lease		None	None		<input type="checkbox"/>
LOCATION: multiple counties, TX, US					
Toyota Motor Corporation (TM)	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
United Parcel Service, Inc. (UPS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vantage Energy Operating Gas Lease	JT	\$1 - \$1,000	royalty income	\$1 - \$200	<input type="checkbox"/>
LOCATION: multiple counties, TX, US					
DESCRIPTION: Purchase					
Verizon Communications Inc. (VZ)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Wells Fargo Bank Deposit Sweep Combined	JT	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Abbott Laboratories (ABT)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
DESCRIPTION: Exchange Sale					
Wells Fargo IRA ⇒ AbbVie Inc. (ABBV)		\$1,001 - \$15,000	Tax-Deferred	None	<input checked="" type="checkbox"/>
DESCRIPTION: Exchange Purchase: ABBV shares acquired through spin off from ABT effective 1/1/13					
Wells Fargo IRA ⇒ America Movil, S.A.B. de C.V. American Depository Receipt Series L (AMX)		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ AT&T Inc. (T)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Berkshire Hathaway Inc. New (BRK.B)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Wells Fargo IRA ⇒ Cigna Corporation (CI)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Express Scripts Holding Company (ESRX)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Fidelity Adv. Series - Equity Growth Fund		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Ford Motor Company (F)		\$1 - \$1,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ General Electric Company (GE)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Hospira Inc (HSP)		\$1 - \$1,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Intel Corporation (INTC)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ International Business Machines Corporation (IBM)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ iShares TIPS Bond ETF (TIP)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Merck & Company, Inc. Common Stock (MRK)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ MFS Series Trust II - Growth FD		None	Capital Gains, Tax-Deferred	None	<input checked="" type="checkbox"/>
DESCRIPTION: Sale					
Wells Fargo IRA ⇒ Microsoft Corporation (MSFT)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Nokia Corporation Sponsored American Depositary Shares (NOK)		\$1 - \$1,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Penn West Petroleum Ltd (PWE)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Southwest Airlines Company (LUV)					
Wells Fargo IRA ⇒ Stryker Corporation (SYK)		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Texas Instruments Incorporated (TXN)		\$1 - \$1,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Time Warner Inc. New (TWX)		\$1 - \$1,000	Tax-Deferred	None	<input type="checkbox"/>
Wells Fargo IRA ⇒ Walt Disney Company (DIS)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Wright Patterson Congressional Credit Union		\$1,001 - \$15,000	None		<input type="checkbox"/>

\* Asset class details available at the bottom of this form.

## SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
2.5 Acres Harbor South, AR  LOCATION: Harbor South, AR, US		04/14/2013	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
26 Acres, Glenwood, AR  LOCATION: Glenwood, AR, US	JT	01/30/2012	P	\$50,001 - \$100,000	
Abbott Labs  DESCRIPTION: Exchange Sale		01/1/2013	S	\$1,001 - \$15,000	<input type="checkbox"/>
Abbvie Inc  DESCRIPTION: Exchange: Abbvie Inc shares acquired through spin off from Abbott Labs effective 1/1/13		01/1/2013	P	\$1,001 - \$15,000	
Fidelity Capital Appreciation  DESCRIPTION: Dividends Reinvested		12/6/2013	P	\$1,001 - \$15,000	
Fidelity Contrafund  DESCRIPTION: Dividends Reinvested		12/13/2013	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Export and Multinational DESCRIPTION: Dividends Reinvested		10/4/2013	P	\$1,001 - \$15,000	
Fidelity International Discovery DESCRIPTION: Partial Sale	JT	04/4/2013	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Lake Point Medical Realty LTD LOCATION: US DESCRIPTION: Purchase: addtl capital contributed to partnership		01/4/2013	P	\$1,001 - \$15,000	
Spouse's Wells Fargo IRA ⇒ MFS Series Trust II - Growth FD	SP	11/2/2013	S	\$1,001 - \$15,000	<input type="checkbox"/>
TD Ameritrade Insured Deposit		01/1/2013	P	\$92.31	
Wells Fargo IRA ⇒ MFS Series Trust II - Growth FD		11/2/2013	S	\$1,001 - \$15,000	<input type="checkbox"/>

\* Asset class details available at the bottom of this form.

### SCHEDULE C: EARNED INCOME

Source	Type	Amount
Wells Fargo IRA	IRA/Pension Income	\$2,490
Spouse's Wells Fargo IRA	IRA/Pension Income	\$1,359

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of America	Feb 2000	Mortgage on 4637 Ivanhoe, Ft Worth, Texas	\$15,001 - \$50,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Trustee (retired member)	Medical Center of Lewisville, Texas

### 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 ASSET CLASS DETAILS**

- o Genworth Variable Annuity Plus (Owner: SP)
- o Spouse's Wells Fargo IRA (Owner: SP)
- o 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

### **COMMENTS**

### **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:** Mr. Michael C. Burgess , 08/1/2014