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## Annual Report for Calendar 2024

The Honorable William Cassidy (Cassidy, Bill)

Filed 05/15/2025 @ 2:44 PM

Print Report

The following statements were checked before filing:

- I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
- I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.
- I *omitted* assets because they meet the three-part test for exemption.

### Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance? **Yes**

| # | Date       | Activity | Amount     | Who Paid?  | Who received payment? | Comments |
|---|------------|----------|------------|--|-----------------------|----------|
| 1 | 01/08/2024 | Speech   | \$5,000.00 | East Texas Baptist University<br>Marshall, Texas | Spouse                | n/a      |

### Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **Yes**

| # | Who Was Paid | Type  | Who Paid   | Amount Paid | Comments |
|---|--------------|-------|--|-------------|----------|
| 1 | Self         | Wages | Louisiana State University and Agricultural and Mechanical College<br>Baton Rouge, Louisiana | \$29,998.00 | n/a      |

### Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

|     | Asset  | Asset Type                             | Owner  | Value                       | Income Type | Income                    |
|-----|--|--|--------|-----------------------------|-------------|---------------------------|
| 1   | <b>Wells Fargo IRA #1</b>  | Retirement Plans<br>IRA                | Self   |                             |             |                           |
| 1.1 | <a href="#">SGIIX</a> - First Eagle Global I (NASDAQ)  | Mutual Funds<br>Mutual Fund            | Self   | None (or less than \$1,001) | None,       | None (or less than \$201) |
| 1.2 | <a href="#">VWIAX</a> - Vanguard Wellesley Income Fund Admiral Shares  | Mutual Funds<br>Mutual Fund            | Self   | None (or less than \$1,001) | None,       | None (or less than \$201) |
| 2   | <b>Wells Fargo IRA #3</b>  | Retirement Plans<br>IRA                | Spouse |                             |             |                           |
| 2.1 | <b>Green Tree 95-8 B2 Financial Corporation</b><br><i>Rate/Coupon: 7.65</i><br><i>Matures: 12/15/2026</i>        | Corporate Securities<br>Corporate Bond | Spouse | \$15,001 - \$50,000         | None,       | None (or less than \$201) |
| 2.2 | <b>Green Tree 95-10 B2 Financial Corporation</b><br><i>Rate/Coupon: 7.4</i><br><i>Matures: 01/15/2027</i>        | Corporate Securities<br>Corporate Bond | Spouse | \$1,001 - \$15,000          | None,       | None (or less than \$201) |
| 2.3 | <b>Countrywide 05-17 1X2 Adjustable Rate Callable</b><br><i>Rate/Coupon: 1.297</i><br><i>Matures: 07/25/2035</i> | Corporate Securities<br>Corporate Bond | Spouse | None (or less than \$1,001) | None,       | None (or less than \$201) |
| 2.4 | <b>Green Tree 1996-6 B2</b><br><i>Rate/Coupon: 8.35</i><br><i>Matures: 8/15/26</i>                               | Corporate Securities<br>Corporate Bond | Spouse | None (or less than \$1,001) | None,       | None (or less than \$201) |
| 2.5 | <b>Green Tree 97-7 B2</b><br><i>Rate/Coupon: 7.59</i><br><i>Matures: 1/15/28</i>                                 | Corporate Securities<br>Corporate      | Spouse | None (or less than \$1,001) | None,       | None (or less than \$201) |

|      |  | Bond   |                 |   | Income        |  |
|------|--|--|-----------------|---|---------------|--|
| 2.6  | Asset<br><b>Green Tree 97-3 B2</b>   | Asset Type<br>Corporate                      | Owner<br>Spouse | Value<br>None (or less<br>than \$1,001) | Type<br>None, | Income<br>None (or less<br>than \$201) |
|      | <i>Rate/Coupon: 8.03</i><br><i>Matures: 3/15/28</i>  | Securities<br>Corporate<br>Bond              |                 |   |               |  |
| 2.7  | <b>Green Tree 98-2 B2</b><br><i>Rate/Coupon: 8.44</i><br><i>Matures: 6/1/28</i>            | Corporate<br>Securities<br>Corporate<br>Bond | Spouse          | None (or less<br>than \$1,001)          | None,         | None (or less<br>than \$201)           |
| 2.8  | <b>Green Tree 98-3 B2</b><br><i>Rate/Coupon: 8.07</i><br><i>Matures: 3/1/30</i>            | Corporate<br>Securities<br>Corporate<br>Bond | Spouse          | None (or less<br>than \$1,001)          | None,         | None (or less<br>than \$201)           |
| 2.9  | <b>Countrywide 05-27 1X2</b><br><i>Rate/Coupon: 1.29</i><br><i>Matures: 8/23/35</i>        | Corporate<br>Securities<br>Corporate<br>Bond | Spouse          | None (or less<br>than \$1,001)          | None,         | None (or less<br>than \$201)           |
| 2.10 | <b>CWALT 05-27 1X1</b><br><i>Rate/Coupon: 1.26</i><br><i>Matures: 8/25/35</i>              | Corporate<br>Securities<br>Corporate<br>Bond | Spouse          | None (or less<br>than \$1,001)          | None,         | None (or less<br>than \$201)           |
| 2.11 | <b>Wells Fargo</b><br>(San Francisco, California)<br><i>Type: Brokerage Sweep Account,</i> | Bank Deposit                                 | Spouse          | \$1,001 - \$15,000                      | None,         | None (or less<br>than \$201)           |
| 3    | <b>TIAA Traditional</b>  | Retirement<br>Plans<br>IRA                   | Spouse          |   |               |  |
| 3.1  | <b>TIAA Traditional</b>  | Mutual Funds<br>Mutual Fund                  | Spouse          | \$1,001 - \$15,000                      | None,         | None (or less<br>than \$201)           |
| 4    | <b>TIAA- CREF Retirement</b>   | Retirement<br>Plans<br>IRA                   | Self            |   |               |  |
| 4.1  | <b>TIAA - CREF Traditional</b>   | Mutual Funds<br>Mutual Fund                  | Self            | \$250,001 -<br>\$500,000                | None,         | None (or less<br>than \$201)           |

#### Part 4a. Periodic Transaction Report Summary

In this section, electronically filed periodic transaction report (PTR) transactions are displayed for you.

#### Part 4b. Transactions

Did you, your spouse, or dependent child buy, sell, or exchange an asset where the transaction exceeded \$1,000 and was not reported on Part 4a? **Yes**

| # | Owner | Ticker                | Asset Name                                    | Transaction Type | Transaction Date | Amount                   | Comments |
|---|-------|-----------------------|---|------------------|------------------|--------------------------|----------|
| 1 | Self  | <a href="#">SGIX</a>  | First Eagle Global Fund Class I               | Sale (Full)      | 01/29/2024       | \$1,001<br>-<br>\$15,000 | n/a      |
| 2 | Self  | <a href="#">VWIAX</a> | Vanguard Wellesley Income Fund Admiral Shares | Sale (Full)      | 01/29/2024       | \$1,001<br>-<br>\$15,000 | n/a      |

### Part 5. Gifts

Did you, your spouse, or dependent child receive any reportable gift during the reporting period? **No**

### Part 6. Travel

Did you, your spouse, or dependent child receive any reportable travel? **No**

### Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

| # | Incurred | Debtor | Type     | Points | Rate (Term)       | Amount                  | Creditor                                    | Comments |
|---|----------|--------|----------|--------|-------------------|-------------------------|---|----------|
| 1 | 2016     | Joint  | Mortgage | 0      | 3.625% (30 Years) | \$500,001 - \$1,000,000 | J.P. Morgan Chase & Co. Manhattan, New York | n/a      |
| 2 | 2016     | Joint  | Mortgage | 0      | 3.75% (30 Years)  | \$500,001 - \$1,000,000 | J.P. Morgan Chase & Co. Manhattan, New York | n/a      |

## Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **Yes**

| # | Position Dates      | Position Held | Entity   | Entity Type              | Comments |
|---|---------------------|---------------|--|--------------------------|----------|
| 1 | Aug 2023 to present | Employee      | Louisiana State University and Agricultural and Mechanical College<br>Baton Rouge, Louisiana | Educational Organization | n/a      |

## Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **No**

## Part 10. Compensation

*Only required if you are a candidate or this is your first report* Did any person or entity pay more than \$5,000 to you or for services provided by you? **No**

## Attachments & Comments

*No attachments added.*

*No comments added.*