



Filing ID #10055246

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: James Thomas Marter
Status: Congressional Candidate
State/District: IL14

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 07/9/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chase Bank Business MELL [BA] DESCRIPTION: Chase Bank Business Checking account		\$1,001 - \$15,000	None		
Dow Chemical Employees Pension Plan [PE] DESCRIPTION: Dow Chemical Employee Pension earned from 1985-1997. Pension received as a monthly annuity for the life of recipient and/or spouse.	JT	\$1,001 - \$15,000	retirement pension payment	\$1,001 - \$2,500	\$1,001 - \$2,500
Metropolitan Life Insurance Company [WU] DESCRIPTION: Cash value of a whole life insurance policy. Flexible Premium Multifunded Life \$50,000.	SP	\$1,001 - \$15,000	None		
Metropolitan Life Insurance Company [WU] DESCRIPTION: Flexible Premium Multifunded Life \$100,000.	SP	\$1,001 - \$15,000	None		
Personal bank accounts [BA] DESCRIPTION: Personal bank accounts (Chase Bank, Dow Chemical Employees Credit Union) - balance may vary significantly monthly	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Personal Coin Collection [CO] DESCRIPTION: Miscellaneous coins of all types collected over the years since 1969.	JT	\$1,001 - \$15,000	None		
SEP/IRA ⇒		\$250,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
RBC Wealth Mgmt. SIMPLIFIED Employee Pension [IH]		\$500,000			
DESCRIPTION: RBC Wealth Mgmt. SIMPLIFIED Employee Pension - non managed securities					
SEP/IRA ⇒ RBC Wealth Mgmt. SIMPLIFIED Employee Pension with RBC Unified Portfolio [IH]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: This account has asset managed funds by a fund manager. (current holdings as of May 2022 with RBC Wealth Mgmt. BANK USA DEPOSIT ACCOUNT					
SEP/IRA ⇒ SEP Edward Jones Trust Company [IH]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: SEP Edward Jones Trust Company. Guided Solutions Fund Account					
SEP/IRA ⇒ Goldstar Trust Company ⇒ SEP IRA Goldstar Trust Holdings [OT]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Various Precious Metal Coins and Bullions					
The Chosen, LLC Stock Shares [PS]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	None
DESCRIPTION: The Chosen, LLC - National Investor Network www.nationalinvestornetwork.com/company-profile/The-Chosen-LLC					

* Asset class 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
Marter Enterprises, LLC - Software Consulting Business	Professional Software Consulting Services	\$113,386.42	\$223,121.00
Kendall County Clerk's office	spouse salary	\$624.92	\$1,847.94

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	American Express Business	2017 - ongoing	business and travel expenses	\$10,000 - \$15,000
JT	SoFi Bank, N.A.	Jan. 2022	Credit Loan Short term	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Managing Partner	Marter Enterprises, LLC
COMMENTS: James Marter is a single member LLC and the sole managing partner. Same as reported in the income section. September 2002 to present. Marter Enterprises is a professional Software Consulting Services Company.	

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- SEP/IRA
DESCRIPTION: SEP-IRA for James T Marter.
- SEP/IRA ⇒ Goldstar Trust Company
DESCRIPTION: self-directed IRA containing precious metals

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: James Thomas Marter , 07/9/2023