



Filing ID #10056251

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jim Carris
Status: Congressional Candidate
State/District: IL10

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 01/9/2024
Period Covered: 01/01/2022– 12/31/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Apple Inc. (AAPL) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Associated Bank [BA]		\$500,001 - \$1,000,000	Interest	\$1 - \$200	\$1 - \$200
B&L Pant LLC [OT] DESCRIPTION: Partnership		None	None		
Bright Directions 529 DC1 ⇒ Bright Directions 529 DC1 [5P] LOCATION: IL		\$50,001 - \$100,000	Tax-Deferred		
Bright Directions 529 DC2 ⇒ Bright Directions 529 DC2 [5P] LOCATION: IL		\$50,001 - \$100,000	Tax-Deferred		
Bright Directions 529 DC3 ⇒ Bright Directions 529 DC3 [5P] LOCATION: IL		\$50,001 - \$100,000	Tax-Deferred		
Carris Company [OL]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Lake Forest / Lake, IL, US					
DESCRIPTION: Partnership, real estate brokerage / development					
Colliers Bennett & Kahnwell 401k ⇒ JP Morgan Large Cap Gr R6 Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Colliers Bennett & Kahnwell 401k ⇒ Vanguard Inflation Protection [MF]		\$100,001 - \$250,000	Tax-Deferred		
Colliers Bennett & Kahnwell 401k ⇒ Vanguard Ttl Bnd Mkt Idx Inst [MF]		None	Tax-Deferred		
Colliers Bennett and Kahnweiler, LLC [PS]		\$500,001 - \$1,000,000	None		
DESCRIPTION: Colliers Bennett and Kahnweiler LLC privately held stock.					
Fidelity Investments JFC Individual Brokerage Account ⇒ Money Market [BA]		\$100,001 - \$250,000	None		
Fidelity Investments JFC Individual Brokerage Account ⇒ Proshares Bitcoin (BITO) [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Bitcoin					
Fidelity Investments JFC Individual Brokerage Account ⇒ SPDR Gold (GLD) [EF]		\$50,001 - \$100,000	None		
Fidelity Investments JFC IRA ⇒ Apple Inc. (AAPL) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Investments JFC IRA ⇒ Fidelity Investments JFC IRA [IH]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Investments JFC IRA ⇒ Grayscale Bitcoin TR [OT]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: Grayscale Bitcoin TR (Cryptocurrencies)					
Fidelity Investments JFC IRA ⇒ Mastercard Incorporated (MA) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments JFC IRA ⇒ Money Market [BA]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Investments JFC IRA ⇒ Select Sector SPDR TR Energy ETP [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Investments JFC IRA ⇒ SEZZLE INC CHESS DEP INT (SEZNL) [ST]		\$1 - \$1,000	Tax-Deferred		
Fidelity Investments JFC IRA ⇒ SPDR Gold (GLD) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Land, Silver City, NM [RP] LOCATION: Silver City / Grant, NM, US		\$250,001 - \$500,000	None		
MET Life Insurance [WU]		\$1 - \$1,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Adobe Inc. (ADBE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Airbnb, Inc. - Class A (ABNB) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Applied Materials, Inc. (AMAT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ argenx SE - American Depositary Shares (ARGX) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Arista Networks, Inc. (ANET) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Ashtead Group Plc Un-sponsored ADR (ASHTY) [ST]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley KC IRA ⇒ ASML Holding N.V. - New York Registry Shares (ASML) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Broadcom Inc. (AVGO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Costco Wholesale Corporation (COST) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Eli Lilly and Company (LLY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Ferrari N.V. Common Shares (RACE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Hermes Intl S A Un-sponsored ADR (HESAY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ HubSpot, Inc. (HUBS) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ L'Oreal Co. American Depositary Shares (LRLCY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ lululemon athletica inc. (LULU) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ LVMH Moet Hennessy Louis Vuitton Ordinary Shares (LVMHF) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ MercadoLibre, Inc. (MELI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley KC IRA ⇒ Mobileye Global Inc. - Class A (MBLY) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ MongoDB, Inc. - Class A (MDB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Morgan Stanley Bank Cash [IH]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Netflix, Inc. (NFLX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Novo Nordisk A/S (NVO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Nu Holdings Ltd. Class A Ordinary Shares (NU) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ NVIDIA Corporation (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Palo Alto Networks, Inc. (PANW) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ ServiceNow, Inc. (NOW) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Snowflake Inc. Class A (SNOW) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Tesla, Inc. (TSLA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ The Trade Desk, Inc. - Class A (TTD) [ST]		\$1 - \$1,000	Tax-Deferred		
Morgan Stanley KC IRA ⇒ Vertex, Inc. - Class A (VERX) [ST]		\$1 - \$1,000	Tax-Deferred		
Velodyne Lidar, Inc. (VLDR) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

* 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
Colliers Bennett & Kahnweiler LLC	salary	\$2,116,940.00	\$1,261,740.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Executive Managing Director	Colliers International
Owner, Managing Director	The Carris Company
Board Member	Chicagoland Chamber of Commerce

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
September 2023	The Candidate and Colliers International	The Candidate and Colliers International have made an agreement that will provide the Candidate a leave of absence while he campaigns for this office.
September 2023	The Candidate and Colliers International	The Candidate and Colliers International have made an agreement that will permit the Candidate to participate in an employee deferred income plan and employment benefit plan while he campaigns for this office.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">Bright Directions 529 DC1 LOCATION: ILBright Directions 529 DC2 LOCATION: ILBright Directions 529 DC3 LOCATION: ILColliers Bennett & Kahnwell 401k

- Fidelity Investments JFC Individual Brokerage Account
LOCATION: US
- Fidelity Investments JFC IRA
- Morgan Stanley KC IRA

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: Jim Carris , 01/9/2024