



Filing ID #10056991

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 05/13/2024  
**Period Covered:** 01/01/2023– 04/15/2024

## 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 MELLC [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		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SEP/IRA ⇒ RBC Wealth Mgmt. SIMPLIFIED Employee Pension [IH]		\$250,001 - \$500,000	Tax-Deferred		
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 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	None	\$201 - \$1,000
DESCRIPTION: The Chosen, LLC - National Investor Network <a href="http://www.nationalinvestornetwork.com/company-profile/The-Chosen-LLC">www.nationalinvestornetwork.com/company-profile/The-Chosen-LLC</a>					

\* 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
Marter Enterprises, LLC - Software Consulting Business	Professional Software Consulting Services	\$78,095.00	\$125,979.00
Kendall County Clerk's office	spouse income	\$799.10	\$892.00
Distribution from RBC Wealth Mgmt. SEP	Deferred Income Previously Earned through Marter Enterprises LLC	N/A	\$50,000.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
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.	
Trustee on BOARD OF TRUSTEES	Oswego Public Library District
COMMENTS: Elected Public Trustee - no compensation.	

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>SEP/IRA DESCRIPTION: SEP-IRA for James T Marter.</li><li>SEP/IRA ⇒ Goldstar Trust Company DESCRIPTION: self-directed IRA containing precious metals</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:** Mr. James Thomas Marter , 05/13/2024