



Filing ID #10056473

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: James Vincent Hemenway
Status: Congressional Candidate
State/District: CO07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 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
Bank Account ⇒ Wells Fargo Checking Account [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Deferred Compensation ⇒ Bond Index Fund [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
Deferred Compensation ⇒ S&P 500 Index Fund [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
James V Hemenway IRA ⇒ Money Market Fund [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
James V Hemenway IRA ⇒ Total International Index [MF]		\$1,000,001 - \$5,000,000	Tax-Deferred		
James V Hemenway IRA ⇒ Total Stock Market Index [MF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Roth IRA					
Paula Hemenway IRA ⇒ Developed Market Index [MF]	SP	\$100,001 - \$250,000	Required Min Distribution	\$5,001 - \$15,000	\$5,001 - \$15,000
DESCRIPTION: Inherited IRA					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Paula Hemenway IRA ⇒ Value Index Fund (Roth IRA) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
Paula Hemenway IRA ⇒ Value Index Fund (SEP IRA) [MF]	SP	\$1,000,001 - \$5,000,000	Tax-Deferred		
Real Estate ⇒ Button Rock Townhome [RP] LOCATION: Longmont, CO, US	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Real Estate ⇒ Olympia Townhome [RP] LOCATION: Longmont, CO, US	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Real Estate ⇒ Terry St. Townhome [RP] LOCATION: Longmont, CO, US	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Real Estate ⇒ Whitehall Townhome [RP] LOCATION: Longmont, CO, US	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
Taxable Brokerage Account ⇒ iShares Brazil - EWZ [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Taxable Brokerage Account ⇒ KeyCorp (KEY) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	None
Taxable Brokerage Account ⇒ M/I Homes, Inc. (MHO) [ST]	JT	\$100,001 - \$250,000	None		
Taxable Brokerage Account ⇒ Meta Platforms, Inc. - Class A (META) [ST]	JT	\$15,001 - \$50,000	None		
Taxable Brokerage Account ⇒ Money Market Fund [MF]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$1 - \$200
Taxable Brokerage Account ⇒ Money Market Fund [MF]	SP	\$100,001 - \$250,000	Dividends, Interest	\$5,001 - \$15,000	\$1,001 - \$2,500
Taxable Brokerage Account ⇒ SPY [EF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Taxable Brokerage Account ⇒ ST Investment Grade Bond Fund [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$1,001 - \$2,500
Taxable Brokerage Account ⇒ Vanguard Energy - VDE [EF]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Utah 529 Plan ⇒ Custom Portfolio [MF] DESCRIPTION: 529 plan for kids	SP	\$100,001 - \$250,000	Tax-Deferred		

* 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
Wells Fargo Bank	Salary, Bonus	\$180,756.39	\$303,652.71

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Analytics Director	Wells Fargo Bank

SCHEDULE F: AGREEMENTS

None disclosed.

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"> Bank Account (Owner: JT) LOCATION: CO, CO, US DESCRIPTION: Wells Fargo Checking Account Deferred Compensation LOCATION: US

- James V Hemenway IRA
- Paula Hemenway IRA (Owner: SP)
- Real Estate (Owner: JT)
LOCATION: US
- Taxable Brokerage Account (Owner: JT)
LOCATION: CO, US
- Taxable Brokerage Account (100% Interest) (Owner: SP)
LOCATION: CO, CO, US
- Utah 529 Plan (Owner: SP)
LOCATION: UT
DESCRIPTION: 529 for sons

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 Vincent Hemenway , 12/31/2023