



Filing ID #10072250

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** James Bo Mitchell  
**Status:** Congressional Candidate  
**State/District:** TN07

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 08/21/2025  
**Period Covered:** 01/01/2024– 07/22/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Empower 401k ⇒ Fidelity Contrafund K6 (FLCNX) [MF]		\$1,001 - \$15,000	None		
Empower 401k ⇒ Fidelity International Discovery (FIGRX) [MF]		\$1,001 - \$15,000	None		
Empower 401k ⇒ Fidelity Puritan Fund (FPURX) [MF]		\$15,001 - \$50,000	None		
Empower 401k ⇒ Vanguard Total Bond Market Index Fund Institutional Select Shares (VTBSX) [MF]		\$1,001 - \$15,000	None		
Fidelity 401k ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]	SP	\$50,001 - \$100,000	None		
Fidelity 401k ⇒ Vanguard Target Retirement 2040 Fund (VFORX) [MF]	SP	\$100,001 - \$250,000	None		
LPL Financial SEP IRA ⇒ Catalyst/Millburn Hedge Strategy Fund Class I (MBXIX) [MF]		\$15,001 - \$50,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
LPL Financial SEP IRA ⇒ Columbia Dividend Income Fund Class I2 (CDDRX) [MF]		\$1,001 - \$15,000	None		
LPL Financial SEP IRA ⇒ Federated Hermes Strategic Value Dividend Fund Class IS (SVAIX) [MF]		\$15,001 - \$50,000	None		
LPL Financial SEP IRA ⇒ Fidelity Covington Trust Fidelity Enhanced Mid Cap ETF (FMDE) [EF]		\$1,001 - \$15,000	None		
LPL Financial SEP IRA ⇒ GVI-JP Morgan US Govt.- Investor Shares [BA]		\$15,001 - \$50,000	None		
LPL Financial SEP IRA ⇒ Hartford Schroders International Stock Fund (SCIEIX) [MF]		\$1,001 - \$15,000	None		
LPL Financial SEP IRA ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		\$15,001 - \$50,000	None		
LPL Financial SEP IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		\$1,001 - \$15,000	None		
LPL Financial SEP IRA ⇒ Wasatch Small Cap Value Fund (WMCVX) [MF]		\$1,001 - \$15,000	None		
Milliman 401k ⇒ American Funds 2040 Target Date Retirement Fd Cl R-6 (RFGTX) [MF]	SP	\$250,001 - \$500,000	None		

\* 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

<b>Source</b>	<b>Type</b>	<b>Amount Current Year to Filing</b>	<b>Amount Preceding Year</b>
State of Tennessee	state legislator	\$24,000.00	\$38,650.00
Benefit Planning Advisors	consulting	\$16,000.00	\$24,000.00
BCBS of TN	commissions	\$126,000.00	\$111,785.00

<b>Source</b>	<b>Type</b>	<b>Amount Current Year to Filing</b>	<b>Amount Preceding Year</b>
Harpeth Benefits	commissions	\$6,800.00	\$10,000.00
Boys & Girls Club of America	wife's salary	\$120,000.00	\$180,000.00
Lucent Health	Commissions	\$11,650.00	\$19,525.00

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Principal	Harpeth Benefits, LLC

## SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- LPL Financial SEP IRA
- Empower 401k
- Fidelity 401k (Owner: SP)
- Milliman 401k (Owner: SP)

## 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 Bo Mitchell , 08/21/2025