



Filing ID #10072542

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: James Morris Kingston
Status: Congressional Candidate
State/District: GA01

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 10/16/2025
Period Covered: 01/01/2024– 09/16/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
401K ⇒ BlackRock LifePath Index 2055 Port Insti Shs (LIVIX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Brokerage Acct - First City Capital ⇒ Schwab - Cash [BA]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$5,001 - \$15,000
IRA - First City Capital ⇒ Axonic Strategic Income Fund Class I (AXSIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
IRA - First City Capital ⇒ iShares Russell 2000 ETF (IWM) [EF]		\$1,001 - \$15,000	Tax-Deferred		
IRA - First City Capital ⇒ US Treasury NT [GS]		\$1,001 - \$15,000	Tax-Deferred		
IRA - First City Capital ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Tax-Deferred		
IRA - First City Capital ⇒ WisdomTree Emerging Markets High Dividend		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fund (DEM) [EF]					

* 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
Marsh & McLennan Agency LLC	Salary	\$224,918.00	\$341,217.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Dovenmuehle Mortgage Inc	May 2022	Mortgage	\$250,001 - \$500,000
	GMC Financial	September 2023	Truck	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- 401K
- Brokerage Acct - First City Capital
- IRA - First City Capital

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 Morris Kingston , 10/16/2025