



Filing ID #10068408

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** James Henry Graham  
**Status:** Congressional Candidate  
**State/District:** IN09

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2025  
**Filing Date:** 08/08/2025  
**Period Covered:** 01/01/2024– 07/14/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Republic Bank and Trust [BA]	JT	\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: Interest earnings on bank account					
C&J Rental Properties LLC ⇒ C&J Rental Properties LLC [RP]	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: Clark Co., IN, US DESCRIPTION: Rent from two rental properties less expenses					
Capstone Wealth Management Acct ⇒ SEI Global Managed Volatility Fund Class F NL (RCDNX) [MF]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
DESCRIPTION: Dividends on Mutual Funds held by SEI/Capstone					
Capstone Wealth Management Acct ⇒ SEI Global Managed Volatility Fund Class F NL (RCDNX) [MF]	JT	\$250,001 - \$500,000	Capital Gains	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: Capital Gains on SEI/Capstone Holdings					
Charles Schwab ⇒ American Water Works Company, Inc. Common Stock (AWK) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: AWK dividends					
Charles Schwab ⇒ Analog Devices, Inc. - Common Stock (ADI) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: ADI dividend					
Charles Schwab ⇒ Anheuser-Busch Inbev SA Sponsored ADR (BUD) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: BUD dividend					
Charles Schwab ⇒ Apple Inc. - Common Stock (AAPL) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: AAPL dividend					
Charles Schwab ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	JT	\$15,001 - \$50,000	None		
DESCRIPTION: No dividends on brk.b					
Charles Schwab ⇒ CACI International, Inc. Class A Common Stock (CACI) [ST]	JT	\$15,001 - \$50,000	None		
DESCRIPTION: No dividends on CACI					
Charles Schwab ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
DESCRIPTION: CSCO dividend					
Charles Schwab ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Comcast dividend					
Charles Schwab ⇒ Corning Incorporated Common Stock (GLW) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Corning dividend					
Charles Schwab ⇒ Cummins Inc. Common Stock (CMI) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: CMI dividend					
Charles Schwab ⇒ Dell Technologies Inc. Class C Common Stock (DELL) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Dell dividend					

<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>
Charles Schwab ⇒ Fifth Third Bancorp - Common Stock (FITB) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
DESCRIPTION: 5/3rd Dividend					
Charles Schwab ⇒ Freeport-McMoRan, Inc. Common Stock (FCX) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: FCX dividend					
Charles Schwab ⇒ Intel Corporation - Common Stock (INTC) [ST]	JT	\$1,001 - \$15,000	None		
DESCRIPTION: No current dividend on Intel					
Charles Schwab ⇒ McKesson Corporation Common Stock (MCK) [ST]	JT	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: MCK dividend					
Charles Schwab ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Merck dividend					
Charles Schwab ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Microsoft dividend					
Charles Schwab ⇒ Morgan Stanley Common Stock (MS) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Morgan Stanley dividend					
Charles Schwab ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: NextEra Dividend					
Charles Schwab ⇒ Oracle Corporation Common Stock (ORCL) [ST]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Oracle dividend					
Charles Schwab ⇒ Pepsico, Inc. (PEP) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Pepsi dividend					
Charles Schwab ⇒ Pfizer, Inc. Common Stock (PFE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
DESCRIPTION: Pfizer dividend					

<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>
Charles Schwab ⇒ Schwab Prime Advantage Money Fund- Investor Shares (SWVXX) [MF]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
DESCRIPTION: Dividends on Charles Schwab money market account and misc equities held in Schwab brokerage account					
Charles Schwab ⇒ The Cigna Group Common Stock (CI) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Cigna dividend					
Charles Schwab ⇒ Walt Disney Company (DIS) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Disney dividend					
Fidelity IRA ⇒ Fidelity SAI Canada Equity Index Fund (FSCJX) [MF]		\$15,001 - \$50,000	None		
DESCRIPTION: RMDs taken from other Fidelity IRA accounts in 2023, 2024 and 2025					
Fidelity IRA ⇒ Fidelity SAI Inflation-Protected Bond Index Fund (FSPWX) [MF]		\$15,001 - \$50,000	None		
DESCRIPTION: RMDs taken from other Fidelity IRA accounts in 2023, 2024 and 2025					
Fidelity IRA ⇒ Strategic Advisers Fidelity Core Income Fund (FIWGX) [MF]		\$250,001 - \$500,000	None		
DESCRIPTION: RMDs taken from other Fidelity IRA accounts in 2023, 2024 and 2025					
Fidelity IRA ⇒ Strategic Advisers Fidelity Emerging Markets Fund (FGOMX) [MF]		\$50,001 - \$100,000	None		
DESCRIPTION: RMDs taken from other Fidelity IRA accounts in 2023, 2024 and 2025					
Fidelity IRA ⇒ Strategic Advisers Fidelity International Fund (FUSIX) [MF]		\$100,001 - \$250,000	None		
DESCRIPTION: RMDs taken from other Fidelity IRA accounts in 2023, 2024 and 2025					
Fidelity IRA ⇒ Strategic Advisers Fidelity U.S. Total Stock Fund (FCTDX) [MF]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: RMDs from Fidelity IRA and previous 403(b)					
Fifth Third Securities Var Annuity ⇒ American General Life Ins Indexed Annuity [FN]		\$100,001 - \$250,000	None		
DESCRIPTION: This is a deferred annuity - payments begin in July 2035					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
T. Rowe Price Individual Retirement Acct ⇒ T. Rowe Price Government Money Fund (PRRXXX) [MF]		\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: RMD for 2023, 2024 and 2025					
T. Rowe Price Roth IRA Acct ⇒ T. Rowe Price Government Money Fund - I Class (TTGXX) [MF]		\$50,001 - \$100,000	None		
DESCRIPTION: No income taken from this Roth IRA					
TIAA/CREF - 403(b) ⇒ CREF Money Market Account - R3 (QCMMIX) [MF]		\$500,001 - \$1,000,000	Tax-Deferred		
DESCRIPTION: Mutual funds held by TIAA/CREF in 403(b) plan					
Vanguard Brokerage ⇒ Vanguard Cash Reserves Federal Money Market Fund Admiral Shares (VMRXX) [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$2,501 - \$5,000
DESCRIPTION: Money market dividends - Vanguard					
Vanguard Brokerage ⇒ Vanguard Energy Fund Admiral Shares (VGELX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Energy fund dividends					
Vanguard Brokerage ⇒ Vanguard PRIMECAP Fund Admiral Shares (VPMAX) [MF]	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: Primecap dividends					
Vanguard Brokerage ⇒ Vanguard PRIMECAP Fund Admiral Shares (VPMAX) [MF]	JT	\$250,001 - \$500,000	Capital Gains	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: Primecap capital gain					
Vanguard Brokerage ⇒ Vanguard Small Cap Index Fd Admiral Shs (VSMAX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Small cap index dividends					
Vanguard Brokerage ⇒ Vanguard Total International Stock Index Fd Admiral (VTIAX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Total intl stock dividends					
Vanguard Brokerage ⇒ Vanguard Total Stock Market Index Fd Admiral Shs (VTSAX) [MF]	JT	\$250,001 - \$500,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: total stock mkt fund dividends					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Individual Retirement Acct ⇒ Vanguard 500 Index Fund Institutional Select Shares (VFFSX) [MF]	SP	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	None
DESCRIPTION: RMD on IRA holdings					
Vanguard Roth IRA ⇒ Vanguard Windsor II Fund Admiral Shares (VWNAX) [MF]		\$100,001 - \$250,000	None		
DESCRIPTION: No income taken from this Roth IRA					

\* 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

None disclosed.

## SCHEDULE D: LIABILITIES

None disclosed.

## 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

- TIAA/CREF - 403(b)  
DESCRIPTION: University of Louisville Retirement Investment Plan
- T. Rowe Price Individual Retirement Acct  
DESCRIPTION: Individual Retirement Account held by T. Rowe Price
- T. Rowe Price Roth IRA Acct  
DESCRIPTION: Roth IRA held by T. Rowe Price
- Vanguard Roth IRA  
DESCRIPTION: Roth IRA held by Vanguard
- Vanguard Individual Retirement Acct (Owner: SP)  
DESCRIPTION: IRA held by Vanguard
- Capstone Wealth Management Acct (Owner: JT)

DESCRIPTION: Equities

- Vanguard Brokerage (Owner: JT)

DESCRIPTION: Mutual Funds

- Fidelity IRA

DESCRIPTION: Retirement investments held by Fidelity

- Charles Schwab (Owner: JT)

DESCRIPTION: Equities and Mutual Funds

- Fifth Third Securities Var Annuity

DESCRIPTION: Variable Annuity

- C&J Rental Properties LLC (100% Interest) (Owner: JT)

LOCATION: Clark Co., IN, US

DESCRIPTION: LLC for two rental properties in Clark County Indiana

## **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 Henry Graham , 08/08/2025