



Filing ID #10039489

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Justin Amash
Status: Former Member
State/District: MI03

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2021
Filing Date: 02/2/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab Investment Account ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR MidCap Trust Series I (MDY) [EF]		None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR S&P 500 (SPY) [EF]		None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Amazon.com, Inc. (AMZN) [ST]	DC	\$50,001 - \$100,000	Dividends	None	<input type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Cash [BA]	DC	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Sonos, Inc. (SONO) [ST]	DC	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒	DC	\$50,001 -	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
SPDR MidCap Trust Series I (MDY) [EF]		\$100,000			
Charles Schwab Investment Account - DC1 ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Walt Disney Company (DIS) [ST]	DC	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Amazon.com, Inc. (AMZN) [ST]	DC	\$50,001 - \$100,000	Dividends	None	<input type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Apple Inc. (AAPL) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Cash [BA]	DC	\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ SPDR MidCap Trust Series I (MDY) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Walt Disney Company (DIS) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Amazon.com, Inc. (AMZN) [ST]	DC	\$50,001 - \$100,000	Dividends	None	<input type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Cash [BA]	DC	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Nintendo Co Ltd ADR (NTDOY) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ SPDR MidCap Trust Series I (MDY) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab Investment Account - DC3 ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Walt Disney Company (DIS) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Investments 401(k) Plan ⇒ Fidelity 500 Index Fund (FXAIX) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Investments 401(k) Plan ⇒ Fidelity Extended Market Index Fund (FSMAX) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Fifth Third Bank Checking Account [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Standard Bear, LLC ⇒ Commercial Real Estate [RP] LOCATION: Caledonia, MI, US		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Standard Bear, LLC ⇒ Independent Bank Checking Account [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Standard Bear, LLC ⇒ Miscellaneous [OT] DESCRIPTION: Intangible		\$1,001 - \$15,000	Intangible	\$1,001 - \$2,500	<input type="checkbox"/>
Standard Bear, LLC ⇒ Note [DO] DESCRIPTION: Loan to Tekton, Inc., Wyoming, MI		None	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
State of Michigan/Voya 401(k) Plan ⇒ BlackRock S&P SmallCap Index Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Michigan/Voya 401(k) Plan ⇒ State Street S&P 500 Index Fund [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State of Michigan/Voya 401(k) Plan ⇒ State Street S&P MidCap Index Fund [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State of Michigan/Voya 457 Plan ⇒ BlackRock S&P SmallCap Index Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Michigan/Voya 457 Plan ⇒ State Street S&P 500 Index Fund [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
State of Michigan/Voya 457 Plan ⇒ State Street S&P MidCap Index Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Tekton, Inc. [OL]		\$1,000,001 - \$5,000,000	S Corporation	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Wyoming, MI, US DESCRIPTION: Distributor					

* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab Investment Account ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		01/13/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR MidCap Trust Series I (MDY) [EF]		01/13/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR S&P 500 (SPY) [EF]		01/13/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	03/18/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	10/1/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	11/2/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	12/1/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ SPDR S&P 500 (SPY) [EF]	DC	03/18/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ SPDR S&P 500 (SPY) [EF]	DC	10/1/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ SPDR S&P 500 (SPY) [EF]	DC	11/2/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab Investment Account - DC1 ⇒ SPDR S&P 500 (SPY) [EF]	DC	12/1/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Walt Disney Company (DIS) [ST]	DC	03/18/2020	P	\$15,001 - \$50,000	
Charles Schwab Investment Account - DC2 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	03/18/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	10/1/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	11/2/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	12/1/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ SPDR S&P 500 (SPY) [EF]	DC	03/18/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ SPDR S&P 500 (SPY) [EF]	DC	10/1/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ SPDR S&P 500 (SPY) [EF]	DC	11/2/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ SPDR S&P 500 (SPY) [EF]	DC	12/1/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Walt Disney Company (DIS) [ST]	DC	03/18/2020	P	\$1,001 - \$15,000	
Charles Schwab Investment Account - DC3 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	03/18/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	10/1/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	11/2/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒	DC	12/1/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Invesco QQQ Trust, Series 1 (QQQ) [EF]			(partial)		
Charles Schwab Investment Account - DC3 ⇒ SPDR S&P 500 (SPY) [EF]	DC	03/18/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ SPDR S&P 500 (SPY) [EF]	DC	10/1/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ SPDR S&P 500 (SPY) [EF]	DC	11/2/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ SPDR S&P 500 (SPY) [EF]	DC	12/1/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Walt Disney Company (DIS) [ST]	DC	03/18/2020	P	\$1,001 - \$15,000	

* 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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Fifth Third Bank	July 2004	Personal Residence Equity Line	\$100,001 - \$250,000
	Fifth Third Bank	October 2014	Personal Residence Mortgage	\$100,001 - \$250,000
	Independent Bank	March 2019	Commercial Real Estate Mortgage (via Standard Bear, LLC)	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Owner of Minority Interest	Tekton, Inc.
Member	Standard Bear, LLC

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

- Charles Schwab Investment Account
LOCATION: US
- Charles Schwab Investment Account - DC1 (Owner: DC)
LOCATION: US
- Charles Schwab Investment Account - DC2 (Owner: DC)
LOCATION: US
- Charles Schwab Investment Account - DC3 (Owner: DC)
LOCATION: US
- Fidelity Investments 401(k) Plan
- Standard Bear, LLC
LOCATION: Grand Rapids, MI, US
- State of Michigan/Voya 401(k) Plan
- State of Michigan/Voya 457 Plan

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

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: Hon. Justin Amash , 02/2/2021