



Filing ID #10039471

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Mr. TJ Cox
Status: Former Member
State/District: CA21

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2021
Filing Date: 05/4/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Altria Group, Inc. (MO) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Bristol-Myers Squibb Company (BMY) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
California Bank and Trust [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
California Custom Processing LLC [OL]		None	None		<input type="checkbox"/>
LOCATION: Madera, CA, US DESCRIPTION: Nut processing business; sold below reporting threshold.					
CMSS II LP [OL]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
LOCATION: Fresno, CA, US DESCRIPTION: Property Development Entity					
CMSS Properties LLC [OL]		\$5,000,001 - \$25,000,000	None		<input type="checkbox"/>
LOCATION: Madera, CA, US DESCRIPTION: Property Development Entity					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cool Steam Pastuerization LLC [OL]		None	None		<input type="checkbox"/>
LOCATION: Madera, CA, US DESCRIPTION: Organic nut pasteurizing. Sold below reporting threshold.					
Fort Washington Financial IRA ⇒ Fidelity Contrafund (FCNTX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fort Washington Financial IRA ⇒ Harbor Cap App Inst (HACAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fort Washington Financial IRA ⇒ iShares Russell MidCap Growth (IWP) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fort Washington Financial IRA ⇒ Metropolitan West Total Return Class I (MWTIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fort Washington Financial IRA ⇒ Templeton Global Bond Advisor Class (TGBAX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Fort Washington Financial IRA ⇒ Thornburg LTD Term Income Class I (THIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Fort Washington Financial IRA ⇒ Vanguard Index FDS (VTI) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Metallic Minerals Corp [PS]		\$50,001 - \$100,000	Capital Gains	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
DESCRIPTION: Stock traded on Toronto Stock Exchange					
MJTJ, LLC ⇒ Central Valley NMTC Fund LLC [DO]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
DESCRIPTION: Promissory Note					
Mondelez International, Inc. - Class A (MDLZ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ Allianz Small Cap (PCVAX) [MF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ DWS CROCI Equity Div A (KDAX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Brokerage Account ⇒	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Invesco Charter A (CHTRX) [MF]					
Morgan Stanley Brokerage Account ⇒ Templeton World Fund A (TEMWX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ Vaneck International Investors Gold A (INIVX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
PAAMG- FBO Kathleen Murphy ⇒ CMSS II LP [OL] LOCATION: Fresno, CA, US DESCRIPTION: Property Development Entity	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
PAAMG- FBO Kathleen Murphy ⇒ Profit Sharing Plan [PE]	SP	\$250,001 - \$500,000	None		<input type="checkbox"/>
PAAMG- FBO Kathleen Murphy ⇒ Sequoia Care LP [OL] LOCATION: Fresno, CA, US DESCRIPTION: Property Development Entity	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Sequoia Care LP [OL] LOCATION: Fresno, CA, US DESCRIPTION: Property Development Entity		\$100,001 - \$250,000	None		<input type="checkbox"/>
The Kraft Heinz Company (KHC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Wells Fargo [BA]	JT	\$1 - \$1,000	None		<input type="checkbox"/>

* 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?
Fort Washington Financial IRA ⇒ Templeton Global Bond Advisor Class (TGBAX) [MF]	SP	10/1/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fort Washington Financial IRA ⇒ Thornburg LTD Term Income Class I (THIX) [MF]	SP	10/1/2020	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Metallic Minerals Corp. [OT] LOCATION: CA DESCRIPTION: Stock traded on Toronto Stock Exchange		08/17/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ Allianz Small Cap (PCVAX) [MF]	JT	03/16/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ Allianz Small Cap (PCVAX) [MF]	JT	03/18/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ Allianz Small Cap (PCVAX) [MF]	JT	03/13/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ DWS CROCI Equity Div A (KDHAX) [MF]	JT	03/13/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ DWS CROCI Equity Div A (KDHAX) [MF]	JT	03/16/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ DWS CROCI Equity Div A (KDHAX) [MF]	JT	03/18/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ DWS CROCI Equity Div A (KDHAX) [MF]	JT	06/23/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ Invesco Charter A (CHTRX) [MF]	JT	03/18/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Morgan Stanley Brokerage Account ⇒ Invesco Charter A (CHTRX) [MF]	JT	03/16/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

* 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
Pediatric Anesthesia Associates Medical	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Fresno First Bank	November 2016	Mortgage on Madera CA property held by CMSS Properties LLC	\$5,000,001 - \$25,000,000
	Granite State	1997-1999	Student Loans	\$15,001 - \$50,000
JT	Barclays Bank	December 2020	Business Credit Card Balance	\$10,000 - \$15,000
	Wells Fargo	December 2004	Mortgage on primary residence	\$100,001 - \$250,000
JT	Edward & Robert Tang	September 2019	Settlement payment	\$100,001 - \$250,000
	COMMENTS: Liability disputed			
	Wells Fargo	December 2020	Credit card	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
General Partner	CMSS II, LP
General Partner	Sequoia Care LP
Manager	MJTJ LLC
President	CMSS Management Inc

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

<ul style="list-style-type: none"> Fort Washington Financial IRA (Owner: SP) MJTJ, LLC

LOCATION: US

- Morgan Stanley Brokerage Account (Owner: JT)

LOCATION: US

- PAAMG- FBO Kathleen Murphy (Owner: SP)

LOCATION: US

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: Mr. TJ Cox , 05/4/2021