



Filing ID #10012656

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Jim Cooper  
**Status:** Member  
**State/District:** TN05

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2015  
**Filing Date:** 07/15/2016

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Adams Properties, 33% Interest		\$500,001 - \$1,000,000	Partnership Income	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: Lots on Beach Dr., Gulfport MS; Residence on Bent Tree Circle, Pass Christian, MS; lot on Cat Island, MS; condo unit on Laurel Street in New Orleans, LA.					
Annuity ⇒ CREF Stock R3		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Annuity ⇒ TIAA Traditional		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Brookfield Total Return Fund Inc. (HTR)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
City Holding Company (CHCO)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Coca-Cola Company (KO)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Comcast Corporation - Class A (CMCSA)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Congressional Federal Credit Union Accounts		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cooper Brothers Land Co., 33% Interest		\$5,000,001 - \$25,000,000	Partnership Income	None	<input type="checkbox"/>
DESCRIPTION: Value of Asset reflects gross assets of which filer owns 33% share. Investment Properties in Shelbyville, TN; Smith Mills, KY; Brentwood, TN; and Nashville, TN.					
Cooper Brothers Land Co. ⇒ Farm at 497 Schofner Bridge Road, 463 acres		\$250,001 - \$500,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Farms: Tweedy and Floyd; Utley; Mueth and Brahm; Klondike (see description)		\$500,001 - \$1,000,000	Rent	None	<input type="checkbox"/>
LOCATION: Smith Mills, KY, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount. Full asset description: Tweedy and Floyd, Hwy 266 (575 acres); Utley, Burbank Road (75 acres); Mueth and Brahm, Alzey-Uniontown Rd (270 acres); Klondike, Klondike Rd (453 acres)					
Cooper Brothers Land Co. ⇒ Field on Thompson Creek Road, 80 acres		\$1,001 - \$15,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Lot 6A at 658 Grassmere Office Park, Trousdale Pike		\$1,000,001 - \$5,000,000	Rent	None	<input type="checkbox"/>
LOCATION: Nashville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Lot at 410 Deery Stret		\$1,001 - \$15,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Lot on East Depot Street		\$1,001 - \$15,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Lot on East Holland Street		\$15,001 - \$50,000	Rent	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Lots at 319, 401, 409, and 414 East Lane Street		\$250,001 - \$500,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
Cooper Brothers Land Co. ⇒ Lots on 756 Madison Street		\$250,001 - \$500,000	Rent	None	<input type="checkbox"/>
LOCATION: Shelbyville, TN, US DESCRIPTION: Income reflects filer's total income for all properties held in Cooper Bros. Land Co. Income for this specific property is only a portion of that aggregate amount.					
DNP Select Income Fund (DNP)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Federated GNMA Trust		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Contrafund (FCNTX)		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Growth & Income Fund (FGRIX)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Municipal Money Market		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
General Electric Company (GE)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Hamilton Fairfax LLC, 33% Interest		\$100,001 - \$250,000	Partnership Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Nashville, TN, US DESCRIPTION: Apartment Building on Fairfax in Nashville, TN. Gross value of asset listed; filer owns 33% interest therein.					
Harpeth Green Properties, LLC, 7% Interest		\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: Brentwood, TN, US DESCRIPTION: Interest in Heritage Retirement Facilities LLC and Heritage Health Center LLC					
Inherited IRA ⇒ Fidelity Advisor Growth Opportunities		\$15,001 - \$50,000	None		<input type="checkbox"/>
Inherited IRA ⇒ Fidelity Advisor Series II (FAIGX)		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Intel Corporation (INTC)		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
International Business Machines Corporation (IBM)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
IRA ⇒ Berkshire Hathaway Inc. (BRK.A)		\$100,001 - \$250,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Coca-Cola Company (KO)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ General Electric Company (GE)		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Hewlett-Packard Company (HPQ)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ HP Inc. (HPQ)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Shares acquired as a result of 10/1/15 stock split.					
IRA ⇒ Lennox International, Inc. (LII)		\$100,001 - \$250,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Microsoft Corporation (MSFT)		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ Northern Trust Inst Govt Portfolio		\$250,001 - \$500,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Phoenix Companies, Inc. (PNX)		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ QUALCOMM Incorporated (QCOM)		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Select Medical Holdings Corporation (SEM)		None	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
IRA ⇒ SunTrust Banks, Inc. (STI)		\$50,001 - \$100,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Virtus Investment Partners, Inc. (VRTS)					
IRA ⇒ Wells Fargo & Company (WFC)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Wells Fargo Bank Deposit Accounts		\$250,001 - \$500,000	Tax-Deferred	None	<input type="checkbox"/>
Martha Adams Taylor Estate		None	None		<input type="checkbox"/>
DESCRIPTION: Estate of deceased parent - Inherited in 2014; assets distributed in 2015.					
Northwestern Mutual "Adjustable Comp Life" Policy		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Dividend used to increase value of asset.					
Park Center Partnership I - 7% owner of Gambro Bldg, 5200 Virginia Way		\$1,000,001 - \$5,000,000	Rent	None	<input checked="" type="checkbox"/>
LOCATION: Brentwood, TN, US					
Park Center Partnership II - 7% owner of LBMC Bldg, 5250 Virginia Way		\$1,000,001 - \$5,000,000	Rent	None	<input checked="" type="checkbox"/>
LOCATION: Brentwood, TN, US					
PLC Properties Partnership, 10% Interest		\$250,001 - \$500,000	Partnership Income	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Brentwood, TN, US DESCRIPTION: Warehouse on Highway 31, Orlinda, TN; Maryland Commons LLC, Brentwood, TN, and Harpeth Green Properties, Brentwood, TN. Gross value of asset listed; filer owns 10% interest therein.					
Procter & Gamble Company (PG)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
State Bank Financial Corporation. (STBZ)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
SunTrust Bank Accounts		\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>
Thoma Cressey Friends Fund VI LP ⇒ Cash Account		\$1,001 - \$15,000	Partnership Income	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Value of asset listed reflects filer's 2% share of the Fund.					
Thoma Cressey Friends Fund VI LP ⇒ HGH Equity LLC		None	Tax distribution	None	<input type="checkbox"/>
DESCRIPTION: Value of asset listed reflects filer's 2% share of the Fund. The Fund was liquidated at the end of 2015 but proceeds were not					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
distributed until 2016.					
Thoma Cressey Friends Fund VII LP ⇒ Porter and Chester Institute, Inc.		None	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Value of asset listed reflects filer's 3% share of the Fund. The Fund wrote down its investment to zero at the end of 2015.					
Thoma Cressey Friends Fund VII LP ⇒ Spine Wave, Inc.		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
DESCRIPTION: Value of asset listed reflects filer's 3% share of the Fund.					
Thoma Cressey Friends Fund VII LP ⇒ The Attachmate Group (formerly, Wizard Parent LLC)		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Value of asset listed reflects filer's 3% share of the Fund.					
Virginia Springs Investment, LLC, 8% Interest		\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Brentwood, TN, US DESCRIPTION: Undeveloped land in Brentwood, TN. Gross value of asset listed; filer owns 8% interest therein.					
Wells Fargo Bank Deposit Accounts		\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>

\* Asset class details available at the bottom of this form.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Brookfield Total Return Fund		07/27/2015	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
International Business Machines Corporation (IBM)		07/27/2015	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA ⇒ Select Medical Holdings Corporation (SEM)		03/24/2015	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Park Center Partnership I		11/30/2015	E	\$1,000,001 - \$5,000,000	
LOCATION: Brentwood, TN, US DESCRIPTION: The Cooper Brothers Land Company exchanged its 21% interest in each of these properties for a 7% direct interest for the filer and his two siblings. There was no income or other gain as a result of this transaction.					
Park Center Partnership II		11/30/2015	E	\$1,000,001 - \$5,000,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LOCATION: Brentwood, TN, US DESCRIPTION: The Cooper Brothers Land Company exchanged its 21% interest in each of these properties for a 7% direct interest for the filer and his two siblings. There was no income or other gain as a result of this transaction.					

\* Asset class details available at the bottom of this form.

**SCHEDULE C: EARNED INCOME**

Source	Type	Amount
Wells Fargo Inherited IRA	IRA Distribution (to spouse)	N/A
Vanderbilt University	Approved Teaching Fee (adjunct)	\$20,000.00

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
	SunTrust Mortgage, Inc.	August 1997	Mortgage on personal residence (not rented)	\$100,001 - \$250,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
Honorary Member, Executive Board	Middle Tennessee Council of the Boy Scouts of America
Adjunct Professor	Owen School of Management, Vanderbilt University
General Partner	PLC Properties, LLC
Member	Hamilton Fairfax, LLC
Partner	Cooper Bros. Land Company
Member	Harpeth Green Properties, LLC
Member	Virginia Springs Investments, LLC
Partner	Park Center Partnership I
Partner	Park Center Partnership II

**SCHEDULE F: AGREEMENTS**

None disclosed.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Aspen Institute Congressional Program	03/28/2015	04/3/2015	Nashville, TN - Berlin, Germany - Nashville, TN	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alliance for Health Reform	02/20/2015	02/22/2015	Nashville, TN - Houston, TX - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Annuity
- Cooper Brothers Land Co. (33% Interest)  
LOCATION: Brentwood, TN, US  
DESCRIPTION: Asset values listed for properties held in the Cooper Brothers Land Co. reflect filer's 33% portion of the total asset value.
- Inherited IRA
- IRA
- Thoma Cressey Friends Fund VI LP
- Thoma Cressey Friends Fund VII LP

## 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

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☒ 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. Jim Cooper , 07/15/2016