



Filing ID #10028588

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** James Thomas Marter  
**Status:** Congressional Candidate  
**State/District:** IL14

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2019  
**Filing Date:** 06/27/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Dow Chemical Employees Pension Plan [PE]	JT	\$1,001 - \$15,000	retirement pension payment	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Dow Chemical Employee Pension earned from 1985-1997. Pension received as a monthly annuity for the life of recipient and/or spouse.					
Lincoln Benefit Life Company [FN]	SP	\$1 - \$1,000	Annuity Payment	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Inheritance death benefit annuity payment.					
Metropolitan Life Insurance Company [WU]	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Cash value of a whole life insurance policy. Flexible Premium Multifunded Life \$50,000.					
Metropolitan Life Insurance Company [WU]	SP	\$1,001 - \$15,000	None		
DESCRIPTION: Flexible Premium Multifunded Life \$100,000.					
Personal bank accounts [BA]	JT	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Personal bank accounts (Chase Bank, Dow Chemical Employees Credit Union)					
Personal Coin Collection [CO]	JT	\$1,001 - \$15,000	None		
DESCRIPTION: Miscellaneous coins of all types collected over the years since 1969.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
SEP/IRA ⇒ RBC Wealth Mgmt. SIMPLIFIED Employee Pension [IH]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: RBC Wealth Mgmt. SIMPLIFIED Employee Pension - non managed securities					
SEP/IRA ⇒ RBC Wealth Mgmt. SIMPLIFIED Employee Pension with RBC Unified Portfolio [IH]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: This account has asset managed funds by a fund manager. (current holdings as of May 2019 with RBC Wealth Mgmt. BANK USA DEPOSIT ACCOUNT					
SEP/IRA ⇒ SEP Edward Jones Trust Company [IH]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: SEP Edward Jones Trust Company. Guided Solutions Fund Account					
SEP/IRA ⇒ Goldstar Trust Company ⇒ SEP IRA Goldstar Trust Holdings [OT]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Various Precious Metal Coins and Bullions					

\* 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 Current Year to Filing	Amount Preceding Year
Marter Enterprises, LLC	Professional Software Consulting Services	\$127,123.00	\$226,574.00

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Citi Card	2016	line of credit	\$15,001 - \$50,000
JT	Dow Chemical Employee Credit Union	2015	line of credit	\$15,001 - \$50,000
	American Express Business	2017	business and travel expenses	\$10,000 - \$15,000
	Chase Business MP	2017	business travel expenses	\$10,000 - \$15,000
JT	Sofi Loan	2017	line of credit	\$15,001 - \$50,000
JT	Discover	2018	line of credit	\$10,000 - \$15,000
SP	Target Card Services	2018	line of credit	\$10,000 - \$15,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
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SCHEDULE E: POSITIONS

Position	Name of Organization
Managing Partner	Marter Enterprises, LLC
COMMENTS: James Marter is a single member LLC and the sole managing partner. Same as reported in the income section. September 2002 to present. Marter Enterprises is a professional Software Consulting Services Company.	

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>SEP/IRA DESCRIPTION: SEP-IRA for James T Marter.</li><li>SEP/IRA ⇒ Goldstar Trust Company DESCRIPTION: self-directed IRA containing precious metals</li></ul>
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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 Thomas Marter , 06/27/2019