



Filing ID #10020628

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Roger Williams  
**Status:** Member  
**State/District:** TX25

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2017  
**Filing Date:** 05/14/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Brokerage Account ⇒ Personal Cash Account - Edward Jones [BA]		\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Berkshire Hathaway Inc. (BRK.A) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Chevron Corporation (CVX) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Davis New York Venture Fund A [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Facebook, Inc. - Class A (FB) [ST]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ General Electric Company (GE) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Invesco Diversified Div Fd A [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒	SP	\$1,001 - \$15,000	Capital Gains,	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Invesco Growth & Income Fund CL A [MF]			Dividends		
Edward Jones Brokerage Account 5612 ⇒ Invesco International Growth CL A [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ NVIDIA Corporation (NVDA) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Procter & Gamble Company (PG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Target Corporation (TGT) [ST]	SP	None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Walt Disney Company (DIS) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ AB Intermediate Diversified Muni [MF]	SP	\$1,001 - \$15,000	Dividends, Tax- Exempt	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ American Fundamental Invs F3 [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ American Funds Tax Exempt F3 [MF]	SP	\$1,001 - \$15,000	Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ American High Income Mun BD 3 [MF]	SP	\$1,001 - \$15,000	Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Amern High-Incm Muni BD Cl F-2 [MF]	SP	None	Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Blackrock Equity Dividend [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Blackrock National Municipal [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Bridge Builder Muni Bond Cl I [MF]	SP	\$1,001 - \$15,000	Dividends, Tax- Exempt	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Cba Aggressive Growth [MF]	SP	None	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Brokerage Account 8214 ⇒ Cba Aggressive Growth Is [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Columbia Acorn International [MF]	SP	None	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Columbia Acorn International Y [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Franklin Fed Int-Term T/F Inc [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Franklin Fed Int-Term T/F Inc [MF]	SP	None	Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Frkln Fed Inter Term T/F R6 [MF]	SP	\$1,001 - \$15,000	Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Fundamental Investors [MF]	SP	None	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Harbor Cap Apprec Retirement [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Harbor Capital Appreciation [MF]	SP	None	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Hartford Divid and Growth Cl F [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Hartford Dividend and Growth [MF]	SP	None	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco Comstock [MF]	SP	None	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco Comstock Cl R6 [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco International Growth Fund Cl A [MF]	SP	None	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco INTL Growth Cl R6 [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Brokerage Account 8214 ⇒ iShares MSCI EAFE Value ETF (EFV) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Janus Henderson Mid-Cap Val I [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ JP Morgan Fed Money Mkt [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ MFS Growth Fund [MF]	SP	None	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ MFS Growth R6 [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Personal Cash Account - Edward Jones [BA]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Prud Jenn MD-Cp Cl Q [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$1,001 - \$2,500	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Prudential Jenn Mid Cap [MF]	SP	None	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Tax Exempt Bond [MF]	SP	None	Dividends, Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Thornburg Limited Term Muni [MF]	SP	\$1,001 - \$15,000	Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard FTSE Developed Markets ETF (VEA) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Small-Cap Growth ETF (VBK) [ST]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Small-Cap Value ETF (VBR) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Wells Fargo ST Mun Bond Cl A [MF]	SP	\$1,001 - \$15,000	Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Jack Williams Chevrolet ⇒ 500 Main/Williams GP [OL]		\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Aledo/Parker, TX, US DESCRIPTION: Real Estate					
Jack Williams Chevrolet ⇒ 500 Main/Williams, Ltd. [OL]		\$100,001 - \$250,000	None		<input checked="" type="checkbox"/>
LOCATION: Aledo/Parker, TX, US DESCRIPTION: Real Estate					
Jack Williams Chevrolet ⇒ Jack Williams Chevrolet, Inc. [OL]		\$1 - \$1,000	Interest, Royalties, Auto Dealership, Gains and Losses	None	<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Motor Vehicle Dealership					
Jack Williams Chevrolet ⇒ PBC Network Crossing [RP]		None	None		<input type="checkbox"/>
LOCATION: Austin/Travis, TX, US					
Jack Williams Chevrolet ⇒ Pershing House [RP]		\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US					
Jack Williams Chevrolet ⇒ Van Dyke Energy [OL]		\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Houston/Harris, TX, US DESCRIPTION: Offshore Drilling					
JRW Corporation ⇒ First Texas BHC, Inc. [PS]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: Stock held in JRW Corporation					
JRW Corporation ⇒ JRW Corporation & Affiliates [OL]		Over \$50,000,000	None		<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealer					
JRW II, LLC [OL]		\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Motor Vehicle Dealer					
Lake House [RP]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Marble Falls/Burnet, TX, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Museum Collectibles [CO]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
DESCRIPTION: Sports memorabilia, political & military artifacts, historical documents & photographs, & art					
Note Receivable - Vestry Corporation [DO]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Note Receivable - Williams Chrysler Dodge Jeep [DO]		\$1,000,001 - \$5,000,000	Interest	\$50,001 - \$100,000	<input type="checkbox"/>
Pedernales Electric Cooperative [OT]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Electric cooperative					
Personal Checking Account - Chase Bank [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Personal Checking Account - Legacy Texas Bank [BA]		\$1 - \$1,000	None		<input type="checkbox"/>
Personal Checking Account - Legacy Texas Bank [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Personal Money Market Account - Legacy Texas [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Personal Money Market Account - Legacy Texas [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Personal Residence [RP]		\$5,000,001 - \$25,000,000	None		<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US					
Quintana Energy Partners [RP]		\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Houston/Harris, TX, US					
Renzel Boulevard Car Wash ⇒ Renzel Boulevard Car Wash [OL]		\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Car Wash					
Vestry Corporation ⇒ Palo Pinto Ranch [RP]		None	Capital Gains	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
LOCATION: Graford/Palo Pinto, TX, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vestry Corporation ⇒ Vestry Corporation [OL] LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealership		\$1 - \$1,000	Interest, Warranties	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
Williams Chrysler Plymouth Dodge ⇒ Rental Property [RP] LOCATION: Weatherford/Parker, TX, US		\$100,001 - \$250,000	None		<input type="checkbox"/>
Williams Chrysler Plymouth Dodge ⇒ Williams Chrysler Plymouth Dodge [OL] LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealer		\$1 - \$1,000	Auto Dealership	None	<input type="checkbox"/>
Williams Irrevocable Life Insurance Trust ⇒ Williams Family Irrevocable Trust [OL] LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Life insurance policy (cash surrender value)		\$15,001 - \$50,000	Unearned Interest	None	<input type="checkbox"/>
Williams Irrevocable Life Insurance Trust ⇒ Williams Irrevocable Insurance Trust [OL] LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Life insurance policy (cash surrender value)		\$250,001 - \$500,000	Unearned Interest	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?
Edward Jones Brokerage Account 5612 ⇒ Davis New York Venture Fund [MF]	SP	12/19/2017	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Facebook, Inc. - Class A (FB) [ST]	SP	02/3/2017	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 5612 ⇒ Facebook, Inc. - Class A (FB) [ST]	SP	09/20/2017	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 5612 ⇒ Invesco Diversified Div Fd A [MF]	SP	12/19/2017	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Invesco Growth & Income Fund A [MF]	SP	12/19/2017	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Edward Jones Brokerage Account 5612 ⇒ Invesco International Growth [MF]	SP	12/19/2017	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ NVIDIA Corporation (NVDA) [ST]	SP	09/20/2017	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 5612 ⇒ Target Corporation (TGT) [ST]	SP	01/13/2017	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Cba [MF]	SP	01/12/2017	E	\$1,001 - \$15,000	
DESCRIPTION: Share class conversion from Cba Agreessive Growth to Growth Is					
Edward Jones Brokerage Account 8214 ⇒ Franklin Mut Gbl Dscv Fd Cl Z [MF]	SP	03/14/2017	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ JP Morgan Fed Money Mkt [MF]	SP	05/23/2017	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ Vanguard FTSE Developed Markets ETF (VEA) [ST]	SP	03/14/2017	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ Vanguard Small-Cap Value ETF (VBR) [ST]	SP	03/14/2017	P	\$1,001 - \$15,000	
Vestry Corporation ⇒ Palo Pinto Ranch [RP]		03/3/2017	S	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
LOCATION: Graford/Palo Pinto, TX, US					

\* 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
Williams Chrysler LP	Spouse Salary	N/A
Edward Jones	Retirement	N/A

## SCHEDULE D: LIABILITIES



<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
	Roger Williams (RWCJD)	March 2009	Note Payable	\$500,001 - \$1,000,000
	Roger Williams (Vestry)	July 1995	Note Payable	\$500,001 - \$1,000,000
	Legacy Texas Bank	September 2009	Line of Credit	\$1,000,001 - \$5,000,000
	Legacy Texas Bank	December 2011	Line of Credit	\$500,001 - \$1,000,000
	Legacy Texas Bank	May 2015	Line of Credit	\$500,001 - \$1,000,000
	Legacy Texas Bank	March 2014	Land Loan	\$250,001 - \$500,000
SP	US Bank	December 2017	Line of Credit	\$15,001 - \$50,000
	Legacy Texas Bank	September 2012	Mortgage on Personal Residence (Horseshoe Bay)	\$250,001 - \$500,000
SP	Legacy Texas Bank	December 2017	Line of Credit	\$500,001 - \$1,000,000

## SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Sole Director & President	JRW Corporation
Sole Director & President	Williams Chrysler, LP
Sole Director & President	Williams Chrysler Holding, LLC
Sole Director & President	Vestry Holding, LLC
Sole Director & President	Jack Williams Chevrolet Holding, LLC
Sole Director & President	JRW II, LLC
Director, President, Chairman, & Secretary	Renzel Boulevard Car Wash, Inc
Board of Directors	Pennybacker Capital
Board of Trustees	Texas Christian University
Board of Trustees	Bush School of Government and Public Service
Board of Trustees	Davey O'Brien Foundation
Board of Directors	National Foundation and College Football Hall of Fame

Position	Name of Organization
Finance Committee	George W. Bush President Center

**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**

- Edward Jones Brokerage Account  
LOCATION: US
- Edward Jones Brokerage Account 5612 (Owner: SP)  
LOCATION: US
- Edward Jones Brokerage Account 8214 (Owner: SP)  
LOCATION: US
- Jack Williams Chevrolet  
LOCATION: US
- JRW Corporation  
LOCATION: US
- Renzel Boulevard Car Wash  
LOCATION: US
- Vestry Corporation  
LOCATION: US
- Williams Chrysler Plymouth Dodge  
LOCATION: US
- Williams Irrevocable Life Insurance Trust

**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. Roger Williams , 05/14/2018