



Filing ID #10015677

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: 2016
Filing Date: 05/12/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

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

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Invesco Growth & Income Fund CL A					
Edward Jones Brokerage Account 5612 ⇒ Invesco International Growth Fund CL A	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Procter & Gamble Company (PG)	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Target Corporation (TGT)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Walt Disney Company (DIS)	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Xponential, Inc. (XPOI)	SP	None	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ AB Intermediate Diversified Muni	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Amern High-Incm Muni BD Cl F-2	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Blackrock Equity Dividend	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Blackrock National Municipal	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Bridge Builder Muni Bond CI I	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Cba Aggressive Growth I	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Columbia Acorn International	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Edward Jones Cash Account	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Franklin Fed Int-Term T/F Inc	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Brokerage Account 8214 ⇒ Franklin Mut Gbl Dscv Fd CI Z	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Fundamental Investors Fund F2	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Harbor Capital Appreciation	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Hartford Dividend & Growth	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco Comstock	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco International Growth	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ iShares MSCI EAFE Value ETF (EFV)	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ JP Morgan Fed Money Mkt	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ JP Morgan International Value	SP	None	Capital Gains	None	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Manning & Napier World Opp	SP	None	Capital Gains	None	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ MFS Growth Fund	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Oak Ridge Small Cap Growth	SP	None	Capital Gains	None	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Perkins Mid Cap Value	SP	\$1,001 - \$15,000	Capital Gains, Dividends	None	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Prudential Jenn Mid Cap	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Ridgeworth Ceredex	SP	None	Capital Gains	None	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Brokerage Account 8214 ⇒ T. Rowe Price Tax-Ex Mon Mkt	SP	None	Capital Gains	None	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Tax Exempt BD Fd of America F2	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Thornburg Limited Term Muni	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard FTSE Developed Markets ETF (VEA)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Small-Cap Growth ETF - DNQ (VBK)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Small-Cap Value ETF - DNQ (VBR)	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Wells Fargo Sh Term Mun BD I	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Jack Williams Chevrolet ⇒ 500 Main/Williams GP LLC LOCATION: Aledo/Parker, TX, US DESCRIPTION: Real Estate		\$1,001 - \$15,000	None		<input type="checkbox"/>
Jack Williams Chevrolet ⇒ 500 Main/Williams, Ltd. LOCATION: Aledo/Parker, TX, US DESCRIPTION: Real Estate		\$100,001 - \$250,000	None		<input type="checkbox"/>
Jack Williams Chevrolet ⇒ Jack Williams Chevrolet, Inc. LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Motor Vehicle Dealership		\$1 - \$1,000	Interest, Royalties, Auto Dealership, Gains and Losses	\$50,001 - \$100,000	<input type="checkbox"/>
Jack Williams Chevrolet ⇒ PBC Network Crossing LOCATION: Austin/Travis, TX, US DESCRIPTION: Commercial real estate		None	None		<input type="checkbox"/>
Jack Williams Chevrolet ⇒ Pershing House		\$250,001 - \$500,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Fort Worth/Tarrant, TX, US					
Jack Williams Chevrolet ⇒ Van Dyke Energy		\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: Houston/Harris, TX, US DESCRIPTION: Offshore drilling company					
Jack Williams Chevrolet ⇒ Walsh House		None	Capital Gains	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US					
JRW Corporation ⇒ First Texas BHC, Inc.		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: Stock held in JRW Corporation					
JRW Corporation ⇒ JRW Corporation & Affiliates		\$25,000,001 - \$50,000,000	None		<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealer					
JRW II, LLC		\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Motor Vehicle Dealer					
Lake House		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Marble Falls/Burnet, TX, US					
Museum Collectibles		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
DESCRIPTION: Sports memorabilia, political & military artifacts, historical documents & photographs, & art.					
Note Receivable - Vestry Corporation Weatherford, TX		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Note Receivable - Williams Chrysler Dodge Jeep		\$500,001 - \$1,000,000	Interest	\$50,001 - \$100,000	<input type="checkbox"/>
Pedernales Electric Cooperative		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Electric cooperative					
Personal Checking Account - Chase Bank		\$15,001 - \$50,000	None		<input type="checkbox"/>
Personal Checking Account - Legacy Texas Bank	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Personal Checking Account - Legacy Texas BAnk		\$1,001 - \$15,000	None		<input type="checkbox"/>
Personal Money Market Account - Legacy Texas Bank	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Personal Money Market Account - Legacy Texas Bank	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Personal Residence		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US					
Quintana Energy Partners		\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Houston/Harris, TX, US					
Renzel Boulevard Car Wash ⇒ Renzel Boulevard Car Wash		\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US					
DESCRIPTION: Car Wash					
Vestry Corporation ⇒ Palo Pinto Ranch		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Graford/ Palo Pinto, TX, US					
Vestry Corporation ⇒ Vestry Corporation		\$1 - \$1,000	Interest, Warranties	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US					
DESCRIPTION: Motor Vehicle Dealership					
Williams Chrysler Plymouth Dodge ⇒ Rental Property		\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US					
Williams Chrysler Plymouth Dodge ⇒ Williams Chrysler Plymouth Dodge		\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US					
DESCRIPTION: Motor Vehicle Dealer					
Williams Irrevocable Life Insurance Trust ⇒ Williams Family Irrevocable Trust		\$15,001 - \$50,000	Unearned Interest	None	<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US					
DESCRIPTION: Life insurance policy (cash surrender value)					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Williams Irrevocable Life Insurance Trust ⇒ Williams Irrevocable Insurance Trust		\$250,001 - \$500,000	Unearned Interest	None	<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US					
DESCRIPTION: Life insurance policy (cash surrender value)					

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

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Edward Jones Brokerage Account ⇒ Chevron Corporation (CVX)		10/28/2016	S	\$15,001 - \$50,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Berkshire Hathaway Inc. (BRK.A)	SP	04/13/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ General Electric Company (GE)	SP	04/13/2016	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Procter & Gamble Company (PG)	SP	04/13/2016	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Walt Disney Company (DIS)	SP	04/13/2016	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Amern High-Incm Muni BD CI F-2	SP	06/9/2016	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ Blackrock National Municipal	SP	06/6/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Harbor Capital Appreciation	SP	06/6/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco International Growth	SP	06/6/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ iShares MSCI EAFE Value ETF	SP	06/9/2016	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ JP Morgan International VAL L	SP	06/6/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Edward Jones Brokerage Account 8214 ⇒ Manning & Napier World Opp	SP	06/6/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Oak Ridge Small Cap Growth	SP	10/5/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Perkins Mid Cap Value	SP	10/5/2016	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Ridgeworth Ceredex	SP	06/6/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ T. Rowe Price Tax-Ex Mon Mkt	SP	05/17/2016	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard FTSE Dev Mkts ETF	SP	06/9/2016	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ Vanguard Small Cap Growth ETF	SP	10/11/2016	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ Vanguard Small Cap Value ETF	SP	06/9/2016	P	\$1,001 - \$15,000	
Jack Williams Chevrolet ⇒ Walsh Ct House		12/12/2016	S	\$250,001 - \$500,000	<input checked="" type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US					

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Williams Chrysler LP	Spouse Salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Roger Williams (RWCJD)	March 2009	Note Payable	\$500,001 - \$1,000,000
	Roger Williams (Vestry)	July 1995	Note Payable	\$500,001 -

Owner	Creditor	Date Incurred	Type	Amount of Liability
				\$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
	Legacy Texas Bank	September 2012	Mortgage on Personal Residence (Horseshoe Bay)	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
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 Football Foundation and College Football Hall of Fame
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 , 05/12/2017