

UNITED STATES HOUSE OF REPRESENTATIVES FINANCIAL DISCLOSURE STATEMENT

FORM B

For use by candidates and new employees

Period covered: January 1, 2010 - NOVEMBER 30, 2011

LEGISLATIVE RESOURCE CENTER

2012 JAN -5 PM 12:25

OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES
(Office Use Only)

Name: James R. Old, Jr. Daytime Telephone:

Filer Status	<input checked="" type="checkbox"/> Candidate for the House of Representatives	State: TX District: 14	Date of Election: NOV., 2012	Check if Amendment <input type="checkbox"/>	A \$200 penalty shall be assessed against any individual who files more than 30 days late.
	<input type="checkbox"/> New officer or employee	Employing Office:			

In all sections, please type or print clearly in blue or black ink.

PRELIMINARY INFORMATION — ANSWER EACH OF THESE QUESTIONS

I. Did you or your spouse have "earned" income (e.g., salaries or fees) of \$200 or more from any source in the reporting period? If yes, complete and attach Schedule I.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	IV. Did you hold any reportable positions on or before the date of filing in the current calendar year or in the prior two years? If yes, complete and attach Schedule IV.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
II. Did you, your spouse, or a dependent child receive "unearned" income of more than \$200 in the reporting period or hold any reportable asset worth more than \$1,000 at the end of the period? If yes, complete and attach Schedule II.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	V. Did you have any reportable agreement or arrangement with an outside entity? If yes, complete and attach Schedule V.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
III. Did you, your spouse, or a dependent child have any reportable liability (more than \$10,000) during the reporting period? If yes, complete and attach Schedule III.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	VI. Did you receive compensation of more than \$5,000 from a single source in the two prior years? If yes, complete and attach Schedule VI.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

Each question in this part must be answered and the appropriate schedule attached for each "Yes" response.

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION — ANSWER EACH OF THESE QUESTIONS

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 a 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? Do not answer "yes" unless you have first consulted with the Committee on Ethics.

Yes ☐ No ☒

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List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. Government) totaling \$200 or more during the preceding calendar year. For a spouse, list the source and amount of any honoraria; list only the source for other spouse earned income exceeding \$1,000. See examples below.

Exclude: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

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For additional assets and unearned income, use next page.

Continuation Sheet (if needed)Page 4 of 21

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SCHEDULE II - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name JAMES R. OLD, JR.

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SP, JT, DC	BLOCK A Asset and/or Income Source	BLOCK B Value of Asset												BLOCK C Type of Income							BLOCK D Amount of Income																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																		
		A None	B \$1 - \$1,000	C \$1,001 - \$15,000	D \$15,001 - \$50,000	E \$50,001 - \$100,000	F \$100,001 - \$250,000	G \$250,001 - \$500,000	H \$500,001 - \$1,000,000	I \$1,000,001 - \$5,000,000	J \$5,000,001 - \$25,000,000	K \$25,000,001 - \$50,000,000	L Over \$50,000,000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	Current Year											Preceding Year																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																							
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SCHEDULE II - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name **JAMES R. OLD, JR.**

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BLOCK A			BLOCK B												BLOCK C							BLOCK D																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																	
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SP, JT, DC			A	B	C	D	E	F	G	H	I	J	K	L	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	Current Year											Preceding Year																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																						
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SCHEDULE II - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name **JAMES R. OLD, JR.**

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BLOCK A		BLOCK B													BLOCK C							BLOCK D																								
Asset and/or Income Source		Value of Asset													Type of Income							Amount of Income																								
SP, JT, DC		A	B	C	D	E	F	G	H	I	J	K	L	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	Current Year											Preceding Year														
		None	\$1 - \$1,000	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000								I	II	III	IV	V	VI	VII	VIII	IX	X	XI	None	I	II	III	IV	V	VI	VII	VIII	IX	X	XI			
JT	FRANKLIN RESOURCES INC.		X											X							X											X														
JT	FREEPORT-MCCORMAN COPPER & GOLD INC			X											X						X											X														
JT	GENL DYNAMICS CORP			X											X						X											X														
JT	HSBC HOLDINGS PLC NEW SPON ADR			X											X						X											X														
JT	INTEL CORP			X											X						X											X														
JT	INTL BUSINESS MACH			X											X						X											X														
JT	INTUITIVE SURGICAL INC NEW			X											X						X											X														
JT	JOHNSON & JOHNSON COM			X											X						X											X														
JT	JPMORGAN CHASE & CO			X											X						X											X														
JT	KRAFT FOODS INC CL A			X											X						X											X														
JT	LAUDER ESTEE COS CL A			X											X						X											X														
JT	MCDONALDS CORP			X											X						X											X														
JT	MCGRAW HILL COMPANIES INC			X											X						X											X														
JT	MEDTRONIC INC			X											X						X											X														

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SCHEDULE II - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name **JAMES R. OLD, JR.**

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SP, JT, DC	BLOCK A Asset and/or Income Source	BLOCK B Value of Asset												BLOCK C Type of Income							BLOCK D Amount of Income																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																															
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JT	VANGUARD HEALTH SYSTEMS		X										X								X												X																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																			

SCHEDULE II - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name **JAMES R. OLD, JR.**

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SCHEDULE II - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name **JAMES R. OLD, JR.**

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BLOCK A		BLOCK B													BLOCK C							BLOCK D																															
Asset and/or Income Source		Value of Asset													Type of Income							Amount of Income																															
SP, JT, DC		A	B	C	D	E	F	G	H	I	J	K	L	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	Current Year											Preceding Year																					
		None	\$1 - \$1,000	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000								I	II	III	IV	V	VI	VII	VIII	IX	X	XI	None	\$1 - \$200	\$201 - \$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	\$1,000,001 - \$5,000,000	Over \$5,000,000	I	II	III	IV	V	VI	VII	VIII	IX	X	XI
JT	EZ CORP INC NON VTG CL A		X										X								X										X																						
JT	FISERV INC			X										X							X										X																						
JT	FLOWSERVE CORP			X									X								X										X																						
JT	FMC CORP NEW			X									X								X										X																						
JT	GREAT PLAINS ENERGY INC			X									X								X										X																						
JT	HANSEN NAT CORP		X														X																																				
JT	HASBRO INC			X									X								X										X																						
JT	HOST HOTELS & RESORTS INC			X									X								X										X																						
JT	HUBBELL INC CL B		X														X																																				
JT	INTL FLAVORS&FRGNCS			X									X								X										X																						
JT	INTUIT			X									X								X										X																						
JT	INVESCO LTD		X															X																																			
JT	JARDEN CORP			X									X								X										X																						
JT	KIMCO REALTY CORP		X										X								X										X																						

SCHEDULE II - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name **JAMES R. OLD, JR.**

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BLOCK A		BLOCK B												BLOCK C							BLOCK D																																
Asset and/or Income Source		Value of Asset												Type of Income							Amount of Income																																
SP, JT, DC		A	B	C	D	E	F	G	H	I	J	K	L	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	Current Year											Preceding Year																					
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JT	LIFE TECHNOLOGIES CORP		X											X							X										X																						
JT	LORILLARD INC			X										X							X										X																						
JT	MCDERMOTT INTL INC	X																X			X										X																						
JT	NAVISTAR INTL CORP NEW		X											X							X										X																						
JT	NCR CORP NEW			X										X							X										X																						
JT	NOBLE ENERGY INC			X										X							X										X																						
JT	NUANCE COMMUNICATIONS INC			X										X							X										X																						
JT	PACKAGING CORP OF AMERICA			X										X							X										X																						
JT	PARAMETRIC TECHNOLOGY CORP NEW			X										X							X										X																						
JT	PIONEER NAT RES CO			X										X							X										X																						
JT	PPL CORP			X										X							X										X																						
JT	PSS WORLD MED INC			X										X							X										X																						
JT	PVH CORP COM			X										X							X										X																						
JT	RALCORP HOLDING INC NEW			X										X							X										X																						

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SCHEDULE II - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name **JAMES R. OLD, JR.**

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		None	\$1 - \$1,000	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000								I	II	III	IV	V	VI	VII	VIII	IX	X	XI	None	\$1 - \$200	\$201 - \$1,000	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$1,000,000	\$1,000,001 - \$5,000,000	Over \$5,000,000	I	II	III	IV	V	VI	VII	VIII	IX	X	XI																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																						
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Continuation Sheet (if needed)

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SCHEDULE II - ASSETS AND "UNEARNED" INCOME

Continuation Sheet (if needed)

Name JAMES R. OLD, JR.

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		\$1 - \$1,000	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000	I								II	III	IV	V	VI	VII	VIII	IX	X	XI	I	II	III	IV	V	VI	VII	VIII	IX	X	XI																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																															
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SCHEDULE III — LIABILITIES

Name **JAMES R. OLD, JR.**

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Report liabilities of over \$10,000 owed to any one creditor *at any time* during the reporting period by you, your spouse, or dependent child. Mark the highest amount owed during the reporting period. **Exclude:** Any mortgage on your personal residence (unless there is rental income); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to a spouse, or the child, parent, or sibling of you or your spouse. Report *revolving charge accounts* (i.e., credit cards) only if the balance at the close of the previous calendar year exceeded \$10,000.

SP, DC, JT	Creditor	Date Liability Incurred mo/year	Type of Liability	Amount of Liability										
				A \$10,001— \$15,000	B 15,001— \$50,000	C \$50,001— \$100,000	D \$100,001— \$250,000	E \$250,001— \$500,000	F \$500,001— \$1,000,000	G \$1,000,001— \$5,000,000	H \$5,000,001— \$25,000,000	I \$25,000,001— \$50,000,000	J Over \$50,000,000	
	Example: First Bank of Wilmington, DE	May 1998	Mortgage on 123 Main Street, Dover, DE				X							
JT	COMMUNITY BANK OF TEXAS		CREDIT LINE					X						

SCHEDULE IV — POSITIONS

Report all positions, compensated or uncompensated, held on or before the date of filing during the current calendar year and in the two prior years as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, any nonprofit organization, any labor organization, or any educational or other institution other than the United States.

Exclude: Positions listed on Schedule I; positions held in any religious, social, fraternal, or political entities (such as a political party or campaign organization); and positions solely of an honorary nature.

Position	Name of Organization
PARTNER	GERMER GERTZ, L.L.P.
DIRECTOR/ OFFICER	OLD INVESTMENTS, L.L.C.
PARTNER	COLARDO CANYON, LTD

SCHEDULE V -- AGREEMENTS

Name **JAMES R. OLD, JR.** Page 21 of 21

Identify the date, parties to, and general terms of any agreement or arrangement with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. Government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties To	Terms of Agreement
N/A		

SCHEDULE VI -- COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Report sources of such compensation received by you or your business affiliation for services provided directly by you during the two prior years. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise, or any nonprofit organization if you directly provided the services generating a fee or payment of more than \$5,000. Exclude: Payments by the U.S. Government and any information considered confidential as a result of a privileged relationship recognized by law. Do not repeat information listed on Schedule I.

Source (Name and Address)	Brief Description of Duties
Example: Doe Jones & Smith, Hometown, Homestate	Accounting services
SEE ATTACHED	

For Direct Services Rendered During Previous Two Years (December 1, 2009 -- December 1, 2011)

Baptist Hospitals of Southeast Texas	Beaumont	TX	Legal services	
Benny Ewing	Uvalde	TX	Legal services	
CHC Casualty Risk Retention Group	Downers Grove	IL	Legal services	
David Glaspy, Trustee/Garrison Litigation Mgmt	Walnut Creek	CA	Legal services	
DM Petroleum Company	New Orleans	LA	Legal services	
Gallagher Bassett Services	LaGuana Hills	CA	Legal services	
Gallagher Bassett Services	Plano	TX	Legal services	
Garlock Sealing Technologies, LLC	Palmyra	NY	Legal services	
Garrison Litigation Management Group	Rochester	NY	Legal services	
George Edward Groves, MD	Beaumont	TX	Legal services	
H.B. Zachry Company	San Antonio	TX	Legal services	
Hall Maines Lugin, PC	Houston	TX	Legal services	
Harleysville Lake States Insurance Company	Greensboro	NC	Legal services	
Hartline, Dacus, Barger, Dreyer & Kern, LLP	Dallas	TX	Legal services	
HB Zachry Company	San Antonio	TX	Legal services	
HBE Corporation	St. Louis	MO	Legal services	
HealthSouth Corporation	Birmingham	AL	Legal services	
Ingersoll Rand	Davidson	NC	Legal services	
King & Spalding	Houston	TX	Legal services	
KOR Hotel Management LLC	Los Angeles	CA	Legal services	
Legal Cost Consultants, Inc.	San Clemente	CA	Legal services	
Markel Southwest Underwriters	Glen Allen	VA	Legal services	
Matrix Service	Tulsa	OK	Legal services	
Patterson Pump Company	Tooea	GA	Legal services	
RSM McGladrey, Inc.	Costa Mesa	CA	Legal services	
Seabright Insurance Company	Needham	MA	Legal services	
Sedgewick Claims Management Services, Inc.	Lexington	KY	Legal services	
Talon Insurance Agency	Beaumont	TX	Legal services	
Texas Builders Insurance Association	Austin	TX	Legal services	
Texas Fair Plan Association	Austin	TX	Legal services	
Texas Windstorm Insurance Association	Austin	TX	Legal services	
Texas Windstorm Insurance Company	Austin	TX	Legal services	
Trane US Inc (American Standard)	Piscataway	NJ	Legal services	
United Bilt Homes	Springdale	AR	Legal services	
Weingarten Realty	Addison	TX	Legal services	

For Direct Services Rendered During Previous Two Years (December 1, 2009 -- December 1, 2011)

Wells Fargo Bank	Minneapolis	MN	Legal services		
Westmoreland Hall Maines Lungtin, PC	Houston	TX	Legal services		
Zurich American Insurance Company	Schaumburg	IL	Legal services		