



Filing ID #10003318

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Mr. Jim Cooper
Status: Member
State/District: TN05

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2013
Filing Date: 06/16/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
2319 Woodmont Blvd		\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Adams Properties, 33% Interest		\$250,001 - \$500,000	Partnership Income	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: Pass Christian, MS, US					
DESCRIPTION: Property on Beach Dr., Gulfport MS.					
Annuity ⇒ CREF Stock		\$15,001 - \$50,000	Tax-Deferred	None	<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 type="checkbox"/>
DESCRIPTION: Asset previously reported as Helios Total Return Fund. Name change on 3/14/13.					
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"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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"/>
Cooper Brothers Land Co., 33% Interest		\$5,000,001 - \$25,000,000	Partnership Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Brentwood, TN, US 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	\$161,459	<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	\$161,459	<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	\$161,459	<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	\$161,459	<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	\$161,459	<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	\$161,459	<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. ⇒ Lot on East Holland Street		\$15,001 - \$50,000	Rent	\$161,459	<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 at 319, 401, 409, and 414 East Lane Street		\$250,001 - \$500,000	Rent	\$161,459	<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	\$161,459	<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. ⇒ Park Center Partnership I - 21% owner of Gambro Bldg, 5200 Virginia Way		\$1,000,001 - \$5,000,000	Rent	\$161,459	<input type="checkbox"/>
LOCATION: Brentwood, 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. ⇒ Park Center Partnership II - 21% owner of LBMC Bldg, 5250 Virginia Way		\$1,000,001 - \$5,000,000	Rent	\$161,459	<input type="checkbox"/>
LOCATION: Brentwood, 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 (FGMAX)		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Contrafund (FCNTX)		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Growth & Income Fund (FGRIX)		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Municipal Money Market		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
General Electric Company (GE)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Hamilton Fairfax LLC, 33% Interest		\$100,001 - \$250,000	Partnership Income	\$5,001 - \$15,000	<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					
Intel Corporation (INTC)		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
International Business Machines Corporation (IBM)		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input 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	None	<input type="checkbox"/>
IRA ⇒ Hewlett-Packard Company (HPQ)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Lennox International, Inc. (LII)		\$100,001 - \$250,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Microsoft Corporation (MSFT)		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Northern Trust Inst Govt Portfolio		\$250,001 - \$500,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Phoenix Companies, Inc. (PNX)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA ⇒ QUALCOMM Incorporated (QCOM)		\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Select Medical Holdings Corporation (SEM)		\$1,001 - \$15,000	Tax-Deferred	None	<input checked="" type="checkbox"/>
IRA ⇒ SunTrust Banks, Inc. (STI)		\$50,001 - \$100,000	Tax-Deferred	None	<input type="checkbox"/>
IRA ⇒ Virtus Investment Partners, Inc. (VRTS)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
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"/>
IRA ⇒ Thoma Cressey Friends Fund VII LP ⇒ CLP Healthcare Services, Inc. (Hospice Compassus, Inc.)		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
DESCRIPTION: Value of asset listed reflects filer's 3% share of the Fund.					
IRA ⇒ Thoma Cressey Friends Fund VII LP ⇒ Jazz Pharmaceuticals plc - Ordinary Shares (JAZZ)		None	Capital Gains	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
IRA ⇒ Thoma Cressey Friends Fund VII LP ⇒ Porter and Chester Institute, Inc.		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
DESCRIPTION: Value of asset listed reflects filer's 3% share of the Fund.					
IRA ⇒ 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.					
IRA ⇒ Thoma Cressey Friends Fund VII LP ⇒ Wizard Parent LLC		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
DESCRIPTION: Value of asset listed reflects filer's 3% share of the Fund.					
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.					
PLC Properties Partnership, 10% Interest		\$250,001 - \$500,000	Partnership Income	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: Brentwood, TN, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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"/>
Select Medical Holdings Corporation (SEM)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
State Bank Financial Corporation. (STBZ)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
SunTrust Bank Accounts		\$50,001 - \$100,000	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		\$1,001 - \$15,000	Partnership Income	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Value of asset listed reflects filer's 2% 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		\$100,001 - \$250,000	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?
IRA ⇒ Thoma Cressey Friends Fund VII LP ⇒ Jazz Pharmaceuticals plc - Ordinary Shares (JAZZ)		12/13/2013	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Select Medical Holdings Corporation (SEM)		02/19/2013	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Select Medical Holdings Corporation (SEM)		02/19/2013	E	\$1,001 - \$15,000	
DESCRIPTION: This was a distribution of shares from Thoma Cressey Friends Fund VI and VII.					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Select Medical Holdings Corporation (SEM)		06/25/2013	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

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

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Vanderbilt University	Approved Teaching Fee (adjunct)	\$20,000

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	SunTrust Mortgage, Inc.	August 1997	Mortgage on personal residence (not rented)	\$250,001 - \$500,000

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

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

- 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.
- IRA
- IRA ⇒ Thoma Cressey Friends Fund VII LP
- Thoma Cressey Friends Fund VI 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

COMMENTS

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: Mr. Jim Cooper , 06/16/2014