



Filing ID #10036560

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. Mark Green  
**Status:** Member  
**State/District:** TN07

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2019  
**Filing Date:** 08/12/2020

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
5 Stones Consulting [OL]	JT	\$500,001 - \$1,000,000	Boarding Horses	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Ashland City, Montgomery Co, TN, US					
DESCRIPTION: This is the entity through which our horse boarding operations are conducted.					
A Night With Saddam published by Lulu Press [IP]		\$15,001 - \$50,000	Royalties	\$201 - \$1,000	<input type="checkbox"/>
Alianz Master Dex F Fixed Annuity [FN]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Authentically American Apparel [PS]	SP	\$100,001 - \$250,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Apparel company in Brentwood, TN.					
AXA Retirement Account ⇒ AXA IRA Cash Account [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
AXA Retirement Account ⇒ DFAPX INSTL CL [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
AXA Retirement Account ⇒ DFCEX Emerging MKTS Core Equity CL I [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
AXA Retirement Account ⇒ DFGBX DFA Global Fixed Income CL1 [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
AXA Retirement Account ⇒ DFGEX DFA Global Real Estate Sec INSTL CL [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
AXA Retirement Account ⇒ DFIEIX DFA INTL Core Equity CL1 [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
AXA Retirement Account ⇒ DFIHX DFA 1 Year Fixed Income [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
AXA Retirement Account ⇒ DFQTX DFA US Core Equity 2 INSTL CL [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Birch Creek Properties ⇒ Loans from Birch Creek to Colson Services [DO]	JT	\$500,001 - \$1,000,000	Interest, Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Birch Creek Properties ⇒ Rental Property [RP]	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Ashland City, Montgomery Co, TN, US					
Birch Creek Properties ⇒ Rental Property [RP]	JT	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Clarksville, Montgomery Co, TN, US					
Birch Creek Properties ⇒ Westchester Properties [RE]	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Rental properties in Nashville, TN.					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property - Capitol [RP]	JT	\$50,001 - \$100,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property - Carter [RP]	JT	\$50,001 - \$100,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property - Meadow [RP]	JT	\$100,001 - \$250,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property - Neelys' 1 [RP]		\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property - Neelys 2 [RP]		\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property Anderson [RP]		\$50,001 - \$100,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property Grenada [RP]		\$100,001 - \$250,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property Kenmore [RP]		\$50,001 - \$100,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property Oakdale [RP]		\$50,001 - \$100,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property Oneida [RP]		\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property Porter [RP]		\$100,001 - \$250,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Birch Creek Properties ⇒ Westchester Properties JT ⇒ Property Richmond Hill [RP]		\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Birch Creek Properties ⇒ Westchester Properties ⇒ Property Westchester [RP]	JT	\$15,001 - \$50,000	Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
Colo-Labs Research Company Medical Lab Tests [PS]	SP	\$100,001 - \$250,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Medical laboratory in Knoxville, TN.					
Dia-Tech Oncology [PS]		\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Oncology services in Franklin, TN.					
ETFIS SER TR I Infracap Active MLP [EF]		\$1,000,001 - \$5,000,000	Dividends	None	<input type="checkbox"/>
Franklin Conservative Allocation FD CL B [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Gold [CO]		\$50,001 - \$100,000	Capital Gains	None	<input type="checkbox"/>
Hutch [DO]	SP	\$250,001 - \$500,000	Dividends	None	<input type="checkbox"/>
IRA Innovations Self Directed IRA ⇒ Cash Account [IH]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA Innovations Self Directed IRA ⇒ Note Receivable from Colson Services [DO]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Loan to APP Hold Co [DO]		\$5,000,001 - \$25,000,000	Interest	None	<input type="checkbox"/>
Midland Fixed Annuity IRA [FN]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Brokerage Investment Account Cash [BA]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Oppenheimer Steelpath MLP Income CL A [EF]		\$1,000,001 - \$5,000,000	Dividends	\$100,001 - \$1,000,000	<input type="checkbox"/>
Residence in DC [RP]	JT	\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Washington , DC, US					

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Silver [CO]		\$15,001 - \$50,000	Capital Gains	None	<input type="checkbox"/>
State Farm Anuity [FN]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
State of TN 401(k) ⇒ Allianz NFJ Large Cap Value Instl [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
State of TN 401(k) ⇒ Brown Capital Small Company Inv [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of TN 401(k) ⇒ Columbia Select MidCap [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
State of TN 401(k) ⇒ DFA International Value I [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
State of TN 401(k) ⇒ Fidelity International Discovery [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
State of TN 401(k) ⇒ Fidelity Puritan [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
State of TN 401(k) ⇒ Invest Small Cap Value Y [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
State of TN 401(k) ⇒ Tennessee Value Select [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of TN 401(k) ⇒ Vanguard Institutional Index I [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of TN 401(k) ⇒ Vanguard Total Bond Market Index Inst [MF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
State of TN 457 Plan ⇒ Alliance NFJ Large Cap Value Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of TN 457 Plan ⇒ Brown Capital Small Company Inv [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State of TN 457 Plan ⇒ Columbia Mid Cap Value Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
State of TN 457 Plan ⇒ Fidelity International Discovery [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of TN Consolidated Retirement System [FN]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
TN Personal Residence and Farm HOR [RP]	JT	\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Ashland City, Montgomery Co, TN, 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 B: TRANSACTIONS

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Always Strong ⇒ CrossFit Clarksville, 100% Interest [OL]		12/31/2019	P	\$100,001 - \$250,000	
LOCATION: Clarksville/Montgomery Co, TN, US DESCRIPTION: My wife bought her first CrossFit Gym.					

\* 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

<b>Source</b>	<b>Type</b>	<b>Amount</b>
CrossFit Solafide	Spouse CrossFit Instructor	\$2,450.00

## SCHEDULE D: LIABILITIES

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
JT	F&M Bank	November 2017	Personal loan.	\$500,001 - \$1,000,000
	Republic Bank	OCT 2011	Loan on a rental property	\$100,001 - \$250,000
	Republic Bank	June 2012	Loan on Rental Property	\$50,001 - \$100,000
	Republic Bank	June 2016	Loan on Rental Property	\$50,001 - \$100,000

<b>Owner Creditor</b>		<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
JT	F & M Bank	APRIL 2007	Loan on our personal residence in TN	\$500,001 - \$1,000,000
JT	Wells Fargo	NOV 2018	Home Loan DC Property	\$500,001 - \$1,000,000
JT	Republic Bank	11/25/19	My portion of a Loan on investment property	\$50,001 - \$100,000

## SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Director	Reboot for Recovery
President	Health Professions Insurance Company, LLC
President & CEO	Linden Risk Management LLC
President & CEO	5 Stones Consulting
Director	Boy Scouts of America

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

<b>Source</b>	<b>Trip Details</b>				<b>Inclusions</b>		
	<b>Start Date</b>	<b>End Date</b>	<b>Itinerary</b>	<b>Days at Own Exp.</b>	<b>Lodging?</b>	<b>Food?</b>	<b>Family?</b>
Council of National Policy	02/15/2019	02/16/2019	Washington, DC - Orlando, FL - Nashville, TN	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Club for Growth	02/21/2019	02/23/2019	Nashville, TN - Palm Beach, FL - Nashville, TN	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
German Marshall Fund of the United States	06/27/2019	06/30/2019	Washington, DC - Brussels, Belgium - Nashville, TN	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
American Israel Education Foundation	08/8/2019	08/16/2019	Nashville, TN - Tel Aviv, Israel - Nashville,	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
			TN				

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Always Strong (100% Interest)  
LOCATION: US  
DESCRIPTION: My spouse started a fitness company that purchased a CrossFit Gym 31 DEC 19
- AXA Retirement Account
- Birch Creek Properties (100% Interest) (Owner: JT)  
LOCATION: US  
DESCRIPTION: This is a real estate investment entity with loans to other entities, properties that it rents to individuals, etc.
- Birch Creek Properties ⇒ Westchester Properties (26% Interest) (Owner: JT)  
LOCATION: US  
DESCRIPTION: This company rents individual houses, and small 2 - 4 unit town homes.
- IRA Innovations Self Directed IRA
- State of TN 401(k)
- State of TN 457 Plan

## 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. Mark Green , 08/12/2020