



Filing ID #10037389

# FINANCIAL DISCLOSURE REPORT

---

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

---

## FILER INFORMATION

**Name:** Hon. John R. Carter  
**Status:** Member  
**State/District:** TX31

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2019  
**Filing Date:** 08/11/2020

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset               | Income Type(s) | Income                  | Tx. > \$1,000?           |
|--|-------|------------------------------|----------------|-------------------------|--------------------------|
| Edward Jones Account ⇒<br>Cash [OT]                          |       | \$50,001 -<br>\$100,000      | Interest       | \$201 - \$1,000         | <input type="checkbox"/> |
| DESCRIPTION: Cash in brokerage account                       |       |                              |                |                         |                          |
| Edward Jones Account ⇒<br>Exxon Mobil Corporation (XOM) [ST] |       | \$100,001 -<br>\$250,000     | Dividends      | \$15,001 - \$50,000     | <input type="checkbox"/> |
| Edward Jones Account ⇒<br>Morgan Stanley - CD [BA]           |       | \$50,001 -<br>\$100,000      | Interest       | \$201 - \$1,000         | <input type="checkbox"/> |
| Edward Jones Account ⇒<br>Wells Fargo Bank - CD [BA]         |       | \$50,001 -<br>\$100,000      | Interest       | \$201 - \$1,000         | <input type="checkbox"/> |
| Exxon Mobil Corporation (XOM) [ST]                           |       | \$1,000,001 -<br>\$5,000,000 | Dividends      | \$50,001 -<br>\$100,000 | <input type="checkbox"/> |
| R Bank [BA]  |       | \$250,001 -<br>\$500,000     | Interest       | \$201 - \$1,000         | <input type="checkbox"/> |
| Texas County and District Retirement System<br>[PE]          |       | \$1,001 - \$15,000           | Pension        | \$5,001 - \$15,000      | <input type="checkbox"/> |

| Asset                                 | Owner | Value of Asset       | Income Type(s) | Income               | Tx. > \$1,000?           |
|---------------------------------------|-------|----------------------|----------------|----------------------|--------------------------|
| Texas Judicial Retirement System [PE] |       | \$50,001 - \$100,000 | Pension        | \$50,001 - \$100,000 | <input type="checkbox"/> |
| VeraBank - Checking [BA]              |       | \$50,001 - \$100,000 | Interest       | \$1 - \$200          | <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 Account ⇒<br>Morgan Stanley - CD [BA]                        |       | 09/6/2019  | E        | \$50,001 - \$100,000 |                     |
| DESCRIPTION: CD matured cashed out funds remained in Edward Jones account |       |            |          |                      |                     |
| Edward Jones Account ⇒<br>Well Fargo Bank - CD [BA]                       |       | 10/15/2019 | E        | \$50,001 - \$100,000 |                     |
| DESCRIPTION: CD matured cashed out funds remained in Edward Jones Account |       |            |          |                      |                     |

\* 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

None disclosed.

## SCHEDULE D: LIABILITIES

| Owner | Creditor                                     | Date Incurred | Type                                   | Amount of Liability   |
|-------|--|---------------|--|-----------------------|
| JT    | Dovenmuehle Mortgage                         | Approx. 1976  | Mortgage                               | \$100,001 - \$250,000 |
| JT    | Navient Solutions, Inc (formerly Sallie Mae) | 1988          | Student Loans                          | \$100,001 - \$250,000 |
| JT    | PNC Bank                                     | 12/20/2000    | Mortgage loan was acquired by new bank | \$100,001 - \$250,000 |

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

| Date | Parties To                    | Terms of Agreement                               |
|------|-------------------------------|--|
| 2001 | Myself and the State of Texas | Pension Agreement for Service in Texas Judiciary |

## 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 Account  
LOCATION: US

## 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. John R. Carter , 08/11/2020