



Filing ID #10037718

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: 2019
Filing Date: 08/13/2020

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) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Diamondback Energy, Inc. - Common Stock (FANG) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Personal Cash Account Edward [BA]		\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Berkshire Hathaway Inc. (BRK.A) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Chevron Corporation (CVX) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Davis New York Venture Fund A [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Devon Energy Corporation (DVN) [ST]	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 5612 ⇒ Facebook, Inc. - Class A (FB) [ST]	SP	None	None		<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ General Electric Company (GE) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Invesco Diversified Div Fd A [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Invesco International Growth CL A [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ NVIDIA Corporation (NVDA) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Pfizer, Inc. (PFE) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Procter & Gamble Company (PG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Walt Disney Company (DIS) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ American Fundamental Invs F3 [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ American Funds Tax Exempt F3 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ American High Income Mun BD 3 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Blackrock Equity Dividend [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Blackrock National Municipal [MF]	SP	\$1,001 - \$15,000	Dividends, Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Bridge Builder Muni Bond Cl I [MF]	SP	\$15,001 - \$50,000	Dividends, Tax-Exempt	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Cba Aggressive Growth Is [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Brokerage Account 8214 ⇒ Columbia Acorn International Y [MF]	SP	None	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Frkln Fed Inter Term T/F R6 [MF]	SP	\$1,001 - \$15,000	Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Harbor Cap Apprec Retirement [MF]	SP	None	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Hartford Divid and Growth Cl F [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco Comstock Cl R6 [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco INTL Growth Cl R6 [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ iShares MSCI EAFE Value ETF (EFV) [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Janus Henderson MidCap [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ JP Morgan Fed Money Mkt [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ MFS Growth R6 [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Personal Cash Account Edward [BA]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Prud Jenn MDCp [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Thornburg Limited Term Muni [MF]	SP	\$1,001 - \$15,000	Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard FTSE AllWorld [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard FTSE Developed Markets ETF (VEA) [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Brokerage Account 8214 ⇒ Vanguard SmallCap Growth ETF (VBK) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Small-Cap Value ETF (VBR) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Value ETF [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Wells Fargo ST Mun Bond Cl A [MF]	SP	None	Tax-Exempt	\$1 - \$200	<input type="checkbox"/>
Jack Williams Chevrolet ⇒ 500 Main/Williams GP [OL] LOCATION: Aledo/Parker, TX, US DESCRIPTION: Real Estate		\$1,001 - \$15,000	None		<input type="checkbox"/>
Jack Williams Chevrolet ⇒ 500 Main/Williams, Ltd. [OL] LOCATION: Aledo/Parker, TX, US DESCRIPTION: Real Estate		\$100,001 - \$250,000	None		<input type="checkbox"/>
Jack Williams Chevrolet ⇒ Jack Williams Chevrolet, Inc. [OL] LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Motor Vehicle Dealership		\$1 - \$1,000	Interest, Royalties, Auto Dealership, Gains and Losses	None	<input type="checkbox"/>
Jack Williams Chevrolet ⇒ PBC Network Crossing [RP] LOCATION: Austin/Travis, TX, US		\$1 - \$1,000	None		<input type="checkbox"/>
Jack Williams Chevrolet ⇒ Van Dyke Energy [OL] LOCATION: Houston/Harris, TX, US DESCRIPTION: Offshore Drilling		\$250,001 - \$500,000	None		<input type="checkbox"/>
JRW Corporation ⇒ First Texas BHC, Inc. [PS] DESCRIPTION: Stock held in JRW Corporation		\$50,001 - \$100,000	None		<input type="checkbox"/>
JRW Corporation ⇒ JRW Corporation & Affiliates [OL] LOCATION: Weatherford/Parker, TX, US		Over \$50,000,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Motor Vehicle Dealer					
JRW II, LLC [OL]		\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: FORT WORTH/TARRANT, TX, US DESCRIPTION: MOTOR VEHICLE DEALER					
LAKE HOUSE [RP]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: MARBLE FALLS/BURNET, TX, US					
MUSEUM COLLECTIBLES [CO]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
DESCRIPTION: Sports memorabilia, political & military artifacts, historical documents & photographs, & art					
Note Receivable - Vestry Corporation [DO]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Note Receivable - Williams Chrysler Dodge Jeep [DO]		\$1,000,001 - \$5,000,000	Interest	\$50,001 - \$100,000	<input type="checkbox"/>
Pedernales Electric Cooperative [OT]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Electric cooperative					
Personal Checking Account Legacy [BA]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Personal Checking Account Legacy [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Personal Residence [RP]		\$5,000,001 - \$25,000,000	None		<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US					
Quintana Energy Partners [RP]		\$250,001 - \$500,000	Dividends, Interest, PARTNERSHIP INCOME	None	<input type="checkbox"/>
LOCATION: HOUSTON/HARRIS, TX, US					
Renzel Boulevard Car Wash ⇒ Renzel Boulevard Car Wash [OL]		\$1 - \$1,000	None		<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Car Wash					
Vestry Corporation ⇒		\$1 - \$1,000	Interest,	\$1,000,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vestry Corporation [OL] LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealership			Warranties	\$5,000,000	
Williams Chrysler Plymouth Dodge ⇒ Rental Property [RP] LOCATION: Weatherford/Parker, TX, US		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Williams Chrysler Plymouth Dodge ⇒ Williams Chrysler Plymouth Dodge [OL] LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealer		\$1,000,001 - \$5,000,000	Auto Dealership	None	<input type="checkbox"/>
Williams Irrevocable Life Insurance Trust ⇒ Williams Family Irrevocable Trust [OL] LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Life insurance policy (cash surrender value)		\$15,001 - \$50,000	Unearned Interest	None	<input type="checkbox"/>
Williams Irrevocable Life Insurance Trust ⇒ Williams Irrevocable Insurance Trust [OL] LOCATION: Fort Worth, TX, US DESCRIPTION: Life insurance policy (cash surrender value)		\$250,001 - \$500,000	Unearned Interest	None	<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 Brokerage Account 5612 ⇒ Davis New York Venture A [MF]	SP	12/17/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ General Electric Company (GE) [ST]	SP	02/27/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ NVIDIA Corporation (NVDA) [ST]	SP	03/1/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Walt Disney Company (DIS) [ST]	SP	07/10/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ AB Interm Diversified Muni Z [MF]	SP	10/17/2019	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Edward Jones Brokerage Account 8214 ⇒ Bridge Builder Municipal Bond [MF]	SP	07/8/2019	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco Intl Growth [MF]	SP	10/17/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ MFS Growth [MF]	SP	07/8/2019	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Thornburg Limited Term Muni [MF]	SP	03/19/2019	S	\$1,001 - \$15,000	<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 C: EARNED INCOME

Source	Type	Amount
Williams Chrysler LP	Spouse Salary	\$79,082.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Roger Williams (RWCJD)	March 2009	Note Payable	\$1,000,001 - \$5,000,000
	Roger Williams (Vestry)	July 1995	Note Payable	\$500,001 - \$1,000,000
	Legacy Texas Bank	September 2009	Line of Credit	\$500,001 - \$1,000,000
	Legacy Texas Bank	December 2011	Line of Credit	\$500,001 - \$1,000,000
	Legacy Texas Bank	May 2015	Line of Credit	\$250,001 - \$500,000
	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
SP	Legacy Texas Bank	December 2017	Line of Credit	\$500,001 - \$1,000,000

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Simmons Bank	October 2015	Primary Residence Mortgage	\$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 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 , 08/13/2020