



Filing ID #10062525

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. John James  
**Status:** Member  
**State/District:** MI10

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2022  
**Filing Date:** 08/1/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
2030/2031 Enrollment Portfolio A Michigan Educational Savings Program [5F] LOCATION: MI	DC	\$15,001 - \$50,000	Tax-Deferred		
2032/2033 Enrollment Portfolio A Michigan Educational Savings Program [5F] LOCATION: MI	DC	\$15,001 - \$50,000	Tax-Deferred		
2036/2037 Enrollment Portfolio A Michigan Educational Savings Program [5F] LOCATION: MI	DC	\$15,001 - \$50,000	Tax-Deferred		
American Express National Bank [MF]		\$15,001 - \$50,000	Tax-Deferred		
American Funds 2045 Target DateLT [MF]		\$50,001 - \$100,000	Tax-Deferred		
Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Brandes Emerging Markets Value CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
Calamos Growth [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Chase Bank Bus. Complete [BA]	SP	\$15,001 - \$50,000	None		
Clipper Fund Inc [MF]		\$1,001 - \$15,000	Tax-Deferred		
DF Dent Small Cap Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		
Eaton Vance Worldwide Health Services [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fiat Chrysler Auto Custom Blend 2040 Target Date Fund [OT] DESCRIPTION: Mutual Fund		\$100,001 - \$250,000	Tax-Deferred		
Fiat Chrysler Auto Custom Blend 2045 Target Date Mutual Fund [OT] DESCRIPTION: Mutual Fund		\$1,001 - \$15,000	Tax-Deferred		
Fid Frdm Blend 2045Q [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		
FID Frdm Blnd 2045 R [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		
Fifth-Third Bank [BA]		\$250,001 - \$500,000	None		
FMI Large Cap Inst. CL [MF]		\$1,001 - \$15,000	Capital Gains	Not Applicable	\$1,001 - \$2,500
Harbor Cap Apprec Instl CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
John A. James Children's Trust ⇒ Blackrock Equity Dividend I [MF]		\$100,001 - \$250,000	Dividends		\$2,501 - \$5,000
John A. James Children's Trust ⇒ Columbia Acorn Institutional Class [MF]		\$15,001 - \$50,000	None		
John A. James Children's Trust ⇒ Franklin Growth Fund Advisor Class [MF]		\$100,001 - \$250,000	None		
John A. James Children's Trust ⇒ Invesco Developing Markets Fund Class Y [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
John A. James Children’s Trust ⇒ James Group, Inc. [OL]		\$1,000,001 - \$5,000,000	Dividends	Not Applicable	\$15,001 - \$50,000
LOCATION: Detroit,, MI, US DESCRIPTION: James Group, Inc. is a Holding Company that wholly owns Renaissance Global Logistics, LLC (RGL). RGL is in the business of packing and exporting automotive components. RGL has a wholly owned subsidiary, Five Crowns Trucking, LLC. Five Crowns Trucking performs transportation services for RGL’s automotive packing and exporting business.					
John A. James Children’s Trust ⇒ Morgan Stanley Sweep Account [BA]		\$100,001 - \$250,000	Interest	None	\$201 - \$1,000
John A. James Children’s Trust ⇒ Thornburg International Equity Fund Class I [MF]		\$50,001 - \$100,000	Dividends		\$1,001 - \$2,500
John A. James Qualified Sub chapter S Trust ⇒ OJ Land Development, Inc. [RP]		\$100,001 - \$250,000	None		
LOCATION: Detroit, MI, US					
JP Morgan Chase Insured Cash account (-) [BA]		\$1,001 - \$15,000	None		
Lazard Intl Strategic Equity Instl CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
Morgan Stanley Private Bank [BA]		\$100,001 - \$250,000	None		
Oakmark Advisor CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
Oakmark Global Select Advisor CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
Polen Intl Growth Instl CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
RBC Emerging Markets Equity CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		
SBH Small Cap Value Instl CL [MF]		\$1,001 - \$15,000	Tax-Deferred		
Touchstone Sands Cap Sel Growth CL Y [MF]		\$1,001 - \$15,000	Tax-Deferred		
USAA Checking [BA]	JT	\$1,001 - \$15,000	None		
USAA Checking [BA]		\$1,001 - \$15,000	None		
USAA Savings [BA]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
USAA Savings [BA]	JT	\$100,001 - \$250,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Vanguard FTSE Emerg Mkts [MF]		\$1,001 - \$15,000	Tax-Deferred		

\* Investment vehicle 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 Current Year to Filing	Amount Preceding Year
James Group Inc.	Salary	N/A	\$1,331,581.40
Access Business Group Intl., LLC	Spouse Salary	N/A	N/A
GRLPWR, LLC	Spouse Salary	N/A	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Fairway Independent Mortgage Corp.	1/2022	Mortgage On Primary Residence	\$250,001 - \$500,000
JT	Morgan Stanley Private Bank, Natl. Association	12/2022	Mortgage on Secondary residence	\$500,001 - \$1,000,000

## SCHEDULE E: POSITIONS

Position	Name of Organization
Director	James Group, Inc.
Officer	James Group, Inc
President & CEO	Renaissance Global Logistics, LLC

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2019	James Group, Inc.	I will continue to participate in this 401(k) Plan. The plan sponsor will not make future contributions in the event of separation.

**SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

**SCHEDULE A INVESTMENT VEHICLE DETAILS**

- John A. James Children’s Trust
- John A. James Qualified Sub chapter S Trust

**EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**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 James , 08/1/2024