



Filing ID #10053402

# 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:** 2022  
**Filing Date:** 05/15/2023

## 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]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Diamondback Energy, Inc. - Common Stock (FANG) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Personal Cash Account Edward [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ American Airlines Group, Inc. (AAL) [ST]	SP	\$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 ⇒ ChargePoint Holdings, Inc. (CHPT) [ST]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Chevron Corporation (CVX) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒	SP	\$1,001 - \$15,000	Capital Gains,	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Invesco Diversified Div Fd A [MF]			Dividends		
Edward Jones Brokerage Account 5612 ⇒ Invesco Growth and Income A [MF]	SP	\$1,001 - \$15,000	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 ⇒ NOV Inc. (NOV) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<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	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Stellantis N.V. Common Shares (STLA) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Viatris Inc. (VTRS) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Westinghouse Air Brake Technologies Corporation (WAB) [ST]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	None		<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 ⇒ Blackrock National Municipal [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Bridge Builder Municipal Bond fd [MF]	SP	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Caney Creek Tex Mun Util Dist [CS]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Municipal Bond					
Edward Jones Brokerage Account 8214 ⇒ Eli Lilly and Company (LLY) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Hartford Divid and Growth Cl F [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco Comstock R6 [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco High Yield Municipal [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Ishares Core MSCI Emerging Markets ETF [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ iShares MSCI EAFE Growth ETF (EFG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input 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 ⇒ JP Morgan Chase & Co. (JPM) [ST]	SP	\$1,001 - \$15,000	None		<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 ⇒ Meta Platforms, Inc. - Class A (META) [ST]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ MFS Growth R6 [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ NVIDIA Corporation (NVDA) [ST]	SP	\$1,001 - \$15,000	None		<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 ⇒ Sunshine Biopharma Inc. - Common stock (SBFM) [ST]	SP	\$1 - \$1,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Brokerage Account 8214 ⇒ Truist Financial Corporation (TFC) [ST]	SP	\$1 - \$1,000	None		<input checked="" 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	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Growth ETF (VUG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Mid Cap ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
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	Capital Gains, Dividends	\$1,001 - \$2,500	<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 ⇒ Western Asset Managed [EF]	SP	\$1,001 - \$15,000	None		<input checked="" 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		\$500,001 - \$1,000,000	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"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JRW Corporation ⇒ First Texas BHC, Inc. [PS]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: Stock held in JRW Corporation					
JRW Corporation ⇒ JRW Corporation & Affiliates [OL]		Over \$50,000,000	None		<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US					
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					
Renzel Boulevard Car Wash ⇒ Renzel Boulevard Car Wash [OL]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US					
DESCRIPTION: Car Wash					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vestry Corporation ⇒ Hawk [OL]  LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Aircraft Leasing		\$5,000,001 - \$25,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
Vestry Corporation ⇒ Patriot [OL]  LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Aircraft leasing		\$500,001 - \$1,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
Vestry Corporation ⇒ Vestry Corporation [OL]  LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealership		\$1 - \$1,000	Interest, Warranties	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
Williams Chrysler Plymouth Dodge ⇒ Rental Property [RP]  LOCATION: Weatherford/Parker, TX, US		\$5,000,001 - \$25,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
Williams Chrysler Plymouth Dodge ⇒ Williams Chrysler Plymouth Dodge [OL]  LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealer		\$5,000,001 - \$25,000,000	Auto Dealership	\$1,000,001 - \$5,000,000	<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 8214 ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	06/30/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Edward Jones Brokerage Account 8214 ⇒ American High-inc muni bd f3 [EF]	SP	02/8/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Blackrock National Municipal [EF]	SP	06/30/2022	P	\$15,001 - \$50,000	
Edward Jones Brokerage Account 8214 ⇒ BR Equity Dividend K [EF]	SP	04/8/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ BR Equity Dividend K [EF]	SP	04/8/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Bridge Builder Municipal Bond fd [EF]	SP	02/8/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Bridge Builder Municipal Bond fd [EF]	SP	02/8/2022	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Caney Creek Tex Mun Util Dist [CS]	SP	10/25/2022	P	\$1,001 - \$15,000	
DESCRIPTION: Purchase Bond					
Edward Jones Brokerage Account 8214 ⇒ Eli Lilly and Company (LLY) [ST]	SP	06/30/2022	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ Franklin Fed Interm-trm tf r6 [EF]	SP	02/1/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Franklin Fed Interm-trm tf r6 [MF]	SP	02/1/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco Eqv intl equity r6 [EF]	SP	04/8/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco High Yield Municipal [EF]	SP	06/30/2022	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ Ishares Core MSCI Emerging Markets ETF [EF]	SP	06/30/2022	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ Janus Henderson Mid Cap Val N [MF]	SP	04/8/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Edward Jones Brokerage Account 8214 ⇒ Meta Platforms, Inc. - Class A (META) [ST]	SP	06/30/2022	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ NVIDIA Corporation (NVDA) [ST]	SP	06/30/2022	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ PGIM Jennison Mid-Cap GRW R6 [EF]	SP	04/8/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ PGIM Jennison Mid-Cap GRW R6 [MF]	SP	04/8/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Sunshine Biopharma Inc. - Common stock (SBFM) [ST]	SP	06/30/2022	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ Truist Financial Corporation (TFC) [ST]	SP	06/30/2022	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ Vanguard Mid Cap ETF [EF]	SP	06/30/2022	P	\$1,001 - \$15,000	
Edward Jones Brokerage Account 8214 ⇒ Walt Disney Company (DIS) [ST]	SP	06/22/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Western Asset Managed [EF]	SP	06/30/2022	P	\$1,001 - \$15,000	

\* 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>
Williams Chrysler LP	Spouse Salary	\$127,451.80

## SCHEDULE D: LIABILITIES

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
Roger Williams (RWCJD)		March 2009	Note Payable	\$1,000,001 - \$5,000,000
Roger Williams (Vestry)		July 1995	Note Payable	\$500,001 -

<b>Owner Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
			\$1,000,000
Truist Bank	October 2015	Primary Residence Mortgage	\$250,001 - \$500,000
US Bank	June 2021	Land Loan	\$500,001 - \$1,000,000
First Financial Bank	June 2022	Line of Credit	\$1,000,001 - \$5,000,000

## **SCHEDULE E: POSITIONS**

<b>Position</b>	<b>Name of Organization</b>
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 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

## **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 , 05/15/2023