



CONGRESS OF THE UNITED STATES
HOUSE OF REPRESENTATIVES
WASHINGTON, D.C. 20515

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RECEIVED

September 6, 2024

The Honorable Kevin F. McCumber
Acting Clerk
United States House of Representatives
United States Capitol
Room H154
Washington, DC 20515-6601

LEGISLATIVE RESOURCE CENTER
2024 SEP -6 PM 4:15
OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES

Re: Late PTR, Amendment to previously filed Financial Disclosure Statements

Dear Mr. McCumber, Acting Clerk:

During the process of preparing my 2023 annual financial disclosure, my attorneys uncovered a number of stocks purchased in November 2023 by a trust that functions as a blind trust. I have no control over this trust. Neither I nor my wife initiated or had knowledge of these transactions. Upon becoming aware of these transactions, I immediately directed my accounting and legal teams to work together to report these transactions. Accordingly, prioritizing integrity and transparency above haste in correcting these newly uncovered errors, I filed a late periodic transaction report (PTR) on September 2, 2024 and a late financial disclosure report on September 3, 2024.

Soon after, the trust administrator and trust advisors decided to sell all stocks held by the trust on September 4, 2024 and convert back to mutual funds. A periodic transaction report was filed today, September 6, 2024, reflecting these transactions. This information was discovered and all requisite reports were filed during the August recess period.

In light of this, I directed my legal team to review information regarding the trust assets reported on previously filed financial disclosures. They identified several errors in historic reports, entirely due to oversight by the accountants who manage my family's assets and who prepared the previous reports. This letter serves to amend previously filed financial disclosure reports.

Again, as the assets in question are contained within an entity that functions as a blind trust, at no time have my wife or I ever had control or direction of the assets in question. The transactions in question were also made without our knowledge. Importantly, there were no errors or omissions in any of the assets or liabilities held by and controlled by my wife and me.

It is critical to note that there has been no impropriety nor has any impropriety been alleged with regard to assets traded without my knowledge or control. Regardless, my team and I are committed to providing accurate information quickly and in a transparent, forthright manner. Moreover, I am taking aggressive measures to ensure these types of errors do not occur in the future.

The following asset should not have been included on Schedule A of my Candidate Report filed July 25, 2022: TZINX – Templeton Global Balance Adv.

The following assets were disclosed with incomplete information. The information below reflects fulsome information for the trust assets in my Candidate Report filed July 25, 2022.

Asset	Value of Asset	Income Type	Income
MADVX	\$100,001 - \$250,000	Dividends, Capital Gains	\$201-\$1,000 (current year) \$15,001 - \$50,000 (previous year)
Columbia Acorn Z	\$50,001 - \$100,000	Dividends, Capital Gains	\$201-\$1,000 (current year) \$15,001 - \$50,000 (previous year)
TGVIX – Thornburg International	\$50,001 - \$100,000	Dividends, Capital Gains	\$1-100 (current year) \$5,001 - \$15,000 (previous year)
FCGAX – Franklin Growth Adv	\$100,001 - \$250,000	Dividends, Capital Gains	\$201-\$1,000 (current year) \$15,001 - \$50,000 (previous year)
Morgan Stanley Private Bank	\$50,001 - \$100,000	Interest	\$201-\$1,000 (current year) None (previous year)
Invesco Opp Developing Mkts	\$15,001 - \$50,000	Dividends, Capital Gains	\$1-200 (current and previous years)

The following asset was inadvertently omitted on Schedule A of my previously filed 2022 Amended report filed on August 1, 2024:

Asset	Value of Asset	Income Type	Income	Tx > \$1,000
MSBNA Preferred Savings – QC	\$500,001 - \$1,000,000	Interest	\$15,001-\$50,000	N/A

If you require additional information regarding these amendments, please contact my Chief of Staff Jackson Gross at Jackson.Gross2@mail.house.gov.

Sincerely,

The Honorable John James
Congressman, 10th District of Michigan
1319 Longworth House Office Building
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