



Filing ID #10037970

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Justin Amash
Status: Member
State/District: MI03

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? |
|--|-------|----------------------|----------------|-----------------|-------------------------------------|
| Charles Schwab Investment Account ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account ⇒ SPDR MidCap Trust Series I (MDY) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account ⇒ SPDR S&P 500 (SPY) [EF] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Charles Schwab Investment Account - DC1 ⇒ Amazon.com, Inc. (AMZN) [ST] | DC | \$15,001 - \$50,000 | Dividends | None | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC1 ⇒ Cash [BA] | DC | \$1 - \$1,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Charles Schwab Investment Account - DC1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF] | DC | \$50,001 - \$100,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC1 ⇒ Sonos, Inc. (SONO) [ST] | DC | \$15,001 - \$50,000 | Dividends | None | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC1 ⇒ | DC | \$50,001 - | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|--------------------------|--------------------|-------------------------------------|
| SPDR MidCap Trust Series I (MDY) [EF] | | \$100,000 | | | |
| Charles Schwab Investment Account - DC1 ⇒ SPDR S&P 500 (SPY) [EF] | DC | \$100,001 - \$250,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC1 ⇒ Walt Disney Company (DIS) [ST] | DC | \$50,001 - \$100,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Charles Schwab Investment Account - DC2 ⇒ Amazon.com, Inc. (AMZN) [ST] | DC | \$15,001 - \$50,000 | Dividends | None | <input type="checkbox"/> |
| Charles Schwab Investment Account - DC2 ⇒ Apple Inc. (AAPL) [ST] | DC | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC2 ⇒ Cash [BA] | DC | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Charles Schwab Investment Account - DC2 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF] | DC | \$50,001 - \$100,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Charles Schwab Investment Account - DC2 ⇒ SPDR MidCap Trust Series I (MDY) [EF] | DC | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Charles Schwab Investment Account - DC2 ⇒ SPDR S&P 500 (SPY) [EF] | DC | \$50,001 - \$100,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC2 ⇒ Walt Disney Company (DIS) [ST] | DC | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC3 ⇒ Amazon.com, Inc. (AMZN) [ST] | DC | \$15,001 - \$50,000 | Dividends | None | <input type="checkbox"/> |
| Charles Schwab Investment Account - DC3 ⇒ Cash [BA] | DC | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Charles Schwab Investment Account - DC3 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF] | DC | \$50,001 - \$100,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Charles Schwab Investment Account - DC3 ⇒ Nintendo Co Ltd ADR (NTDOY) [ST] | DC | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC3 ⇒ SPDR MidCap Trust Series I (MDY) [EF] | DC | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|--------------|-------------------------|--------------------------|--------------------|-------------------------------------|
| Charles Schwab Investment Account - DC3 ⇒ SPDR S&P 500 (SPY) [EF] | DC | \$50,001 - \$100,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC3 ⇒ Walt Disney Company (DIS) [ST] | DC | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input checked="" type="checkbox"/> |
| Fidelity Investments 401(k) Plan ⇒ Fidelity 500 Index Fund (FXAIX) [EF] | | \$100,001 - \$250,000 | Tax-Deferred | | <input type="checkbox"/> |
| Fidelity Investments 401(k) Plan ⇒ Fidelity Extended Market Index Fund (FSMAX) [EF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Fifth Third Bank Checking Account [BA] | JT | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Standard Bear, LLC ⇒ Commercial Real Estate [RP] | | \$500,001 - \$1,000,000 | None | | <input type="checkbox"/> |
| LOCATION: Caledonia, MI, US | | | | | |
| Standard Bear, LLC ⇒ Independent Bank Checking Account [BA] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Standard Bear, LLC ⇒ Miscellaneous [OT] | | \$1,001 - \$15,000 | Intangible | \$1,001 - \$2,500 | <input type="checkbox"/> |
| DESCRIPTION: Intangible | | | | | |
| Standard Bear, LLC ⇒ Note [DO] | | \$50,001 - \$100,000 | Interest | \$2,501 - \$5,000 | <input type="checkbox"/> |
| DESCRIPTION: Loan to Tekton, Inc., Wyoming, MI | | | | | |
| State of Michigan/Voya 401(k) Plan ⇒ BlackRock S&P SmallCap Index Fund [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of Michigan/Voya 401(k) Plan ⇒ State Street S&P 500 Index Fund [EF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of Michigan/Voya 401(k) Plan ⇒ State Street S&P MidCap Index Fund [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of Michigan/Voya 457 Plan ⇒ BlackRock S&P SmallCap Index Fund [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| State of Michigan/Voya 457 Plan ⇒ State Street S&P 500 Index Fund [EF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|---------------------------|----------------|--------|--------------------------|
| State of Michigan/Voya 457 Plan ⇒ State Street S&P MidCap Index Fund [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Tekton, Inc. [OL] | | \$1,000,001 - \$5,000,000 | S Corporation | None | <input type="checkbox"/> |
| LOCATION: Wyoming, MI, US | | | | | |
| DESCRIPTION: Distributor | | | | | |

* 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? |
|--|-------|------------|-------------|---------------------|-------------------------------------|
| Charles Schwab Investment Account ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF] | | 02/1/2019 | P | \$1,001 - \$15,000 | |
| Charles Schwab Investment Account ⇒ SPDR MidCap Trust Series I (MDY) [EF] | | 01/2/2019 | P | \$1,001 - \$15,000 | |
| Charles Schwab Investment Account - DC1 ⇒ Amazon.com, Inc. (AMZN) [ST] | DC | 01/2/2019 | P | \$1,001 - \$15,000 | |
| Charles Schwab Investment Account - DC1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF] | DC | 05/1/2019 | P | \$1,001 - \$15,000 | |
| Charles Schwab Investment Account - DC1 ⇒ Sonos, Inc. (SONO) [ST] | DC | 01/2/2019 | P | \$1,001 - \$15,000 | |
| Charles Schwab Investment Account - DC1 ⇒ SPDR MidCap Trust Series I (MDY) [EF] | DC | 05/1/2019 | P | \$1,001 - \$15,000 | |
| Charles Schwab Investment Account - DC1 ⇒ SPDR S&P 500 (SPY) [EF] | DC | 01/2/2019 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC1 ⇒ SPDR S&P 500 (SPY) [EF] | DC | 04/15/2019 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC2 ⇒ Apple Inc. (AAPL) [ST] | DC | 01/2/2019 | P | \$1,001 - \$15,000 | |
| Charles Schwab Investment Account - DC2 ⇒ SPDR S&P 500 (SPY) [EF] | DC | 01/2/2019 | S (partial) | \$15,001 - \$50,000 | <input checked="" type="checkbox"/> |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|--|--------------|-------------|-----------------|--------------------|-------------------------------------|
| Charles Schwab Investment Account - DC2 ⇒ SPDR S&P 500 (SPY) [EF] | DC | 04/15/2019 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC2 ⇒ Walt Disney Company (DIS) [ST] | DC | 01/2/2019 | P | \$1,001 - \$15,000 | |
| Charles Schwab Investment Account - DC3 ⇒ Nintendo Co Ltd ADR (NTDOY) [ST] | DC | 05/1/2019 | P | \$1,001 - \$15,000 | |
| Charles Schwab Investment Account - DC3 ⇒ SPDR S&P 500 (SPY) [EF] | DC | 01/2/2019 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC3 ⇒ SPDR S&P 500 (SPY) [EF] | DC | 04/15/2019 | S (partial) | \$1,001 - \$15,000 | <input checked="" type="checkbox"/> |
| Charles Schwab Investment Account - DC3 ⇒ Walt Disney Company (DIS) [ST] | DC | 01/2/2019 | 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

None disclosed.

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|--------------|------------------|----------------------|--|----------------------------|
| | Fifth Third Bank | July 2004 | Personal Residence Equity Line | \$100,001 - \$250,000 |
| | Fifth Third Bank | October 2014 | Personal Residence Mortgage | \$100,001 - \$250,000 |
| | Chemical Bank | May 2016 | Commercial Real Estate Mortgage (via Standard Bear, LLC) | \$500,001 - \$1,000,000 |
| | Independent Bank | March 2019 | Commercial Real Estate Mortgage (via Standard Bear, LLC) | \$500,001 - \$1,000,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|----------------------------|-----------------------------|
| Owner of Minority Interest | Tekton, Inc. |
| Member | Standard Bear, LLC |

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

- Charles Schwab Investment Account
LOCATION: US
- Charles Schwab Investment Account - DC1 (Owner: DC)
LOCATION: US
- Charles Schwab Investment Account - DC2 (Owner: DC)
LOCATION: US
- Charles Schwab Investment Account - DC3 (Owner: DC)
LOCATION: US
- Fidelity Investments 401(k) Plan
- Standard Bear, LLC
LOCATION: Grand Rapids, MI, US
- State of Michigan/Voya 401(k) Plan
- State of Michigan/Voya 457 Plan

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. Justin Amash , 08/13/2020