



Filing ID #10053928

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

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

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2022
Filing Date: 08/13/2023

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 [MF] | DC | \$15,001 - \$50,000 | None | | |
| 2032/2033 Enrollment Portfolio A [MF] | DC | \$15,001 - \$50,000 | None | | |
| 2036/2037 Enrollment Portfolio A [MF] | DC | \$15,001 - \$50,000 | None | | |
| 2040 Target Date Fund [MF] | | \$100,001 - \$250,000 | None | | |
| 2045 Target Date Fund [MF] | | \$1,001 - \$15,000 | None | | |
| American Express National Bank [MF] | | \$15,001 - \$50,000 | None | | |
| American Funds 2045 Target DateLT [MF] | | \$50,001 - \$100,000 | None | | |
| Baron Emerging Markets Instl CL [BA] | | \$1,001 - \$15,000 | None | | |
| Brandes Emerging Markets Value CL [MF] | | \$1,001 - \$15,000 | None | | |
| Calamos Growth [MF] | | \$15,001 - \$50,000 | None | | |

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|---|-------|-----------------------|------------------------------------|-------------------------------------|--------------------------|
| Chase Bank Bus. Complete [BA] | SP | \$15,001 - \$50,000 | None | | |
| Clipper Fund Inc [MF] | | \$1,001 - \$15,000 | None | | |
| DF Dent Small Cap Growth [MF] | | \$1,001 - \$15,000 | None | | |
| Eaton Vance Worldwide Health Services [MF] | | \$1,001 - \$15,000 | None | | |
| Fid Frdm Blend 2045Q [MF] | SP | \$50,001 - \$100,000 | None | | |
| FID Frdm Blnd 2045 R [MF] | SP | \$250,001 - \$500,000 | None | | |
| Fifth-Third Money [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 | None | | |
| Joh A. James Children's Trust ⇒ James Group, Inc. [OL] | | \$15,001 - \$50,000 | 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. | | | | | |
| Joh A. James Children's Trust ⇒ Morgan Stanley Brokerage Accounts [EQ] | | Undetermined | Capital Gains, Dividends, Interest | Not Applicable | \$50,001 - \$100,000 |
| 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 [MF] | | \$1,001 - \$15,000 | None | | |
| Lazard Intl Strategic Equity Instl CL [MF] | | \$1,001 - \$15,000 | None | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|--------------------------|----------------|-------------------------------------|--------------------------|
| Morgan Stanley Private Bank [BA] | | \$100,001 - \$250,000 | None | | |
| Oakmark Advisor CL [MF] | | \$1,001 - \$15,000 | None | | |
| Oakmark Global Select Advisor CL [MF] | | \$1,001 - \$15,000 | None | | |
| Polen Intl Growth Instl CL [MF] | | \$1,001 - \$15,000 | None | | |
| RBC Emerging Markets Equity CL I [MF] | | \$1,001 - \$15,000 | None | | |
| SBH Small Cap Value Instl CL [MF] | | \$1,001 - \$15,000 | None | | |
| Touchstone Sands Cap Sel Growth CL Y [MF] | | \$1,001 - \$15,000 | None | | |
| 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 | | |
| USAA Savings [BA] | JT | \$100,001 - \$250,000 | Interest | \$201 - \$1,000 | \$201 - \$1,000 |
| Vanguard FTSE Emerg Mkts [MF] | | \$1,001 - \$15,000 | None | | |

* 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 Current Year to Filing | Amount Preceding Year |
|------------------|--------|-------------------------------------|--------------------------|
| James Group Inc. | Salary | \$721,984.00 | \$1,331,581.40 |

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 Gorup, 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 ASSET CLASS DETAILS

- Joh 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 , 08/13/2023