



Filing ID #10053783

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. John W. Rose  
**Status:** Member  
**State/District:** TN06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 09/12/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Anthem CityLine/Bay Capital Partners, LP, 1% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Richardson, TX, US					
DESCRIPTION: Limited partner in entity that owns multi-family residential development. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					
Boson Holdings, LLC 401K Plan ⇒ American Funds 2030 TRGT Date Retire R2E RBEX [MF]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investments held in company 401K and Roth 401K plan. 401K investments are managed by American Funds.					
Broad River/MP, LP, 1% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Beaufort, SC, US					
DESCRIPTION: Limited partner in entity that owns multi-family residential development. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a lower net income for the year.					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Brookleigh Flats, 19% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$201 - \$1,000	<input checked="" type="checkbox"/>
LOCATION: Atlanta, GA, US					
DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Duet, 11% Interest [OL]		\$15,001 - \$50,000	K-1, LP Income	\$201 - \$1,000	<input checked="" type="checkbox"/>
LOCATION: Nashville, TN, US					
DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Gibson Flowery Branch, 14% Interest [OL]		\$15,001 - \$50,000	K-1, LP Income	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
LOCATION: Atlanta, GA, US					
DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Note 16, 5% Interest [OL]		\$15,001 - \$50,000	K-1, LP Income	\$201 - \$1,000	<input checked="" type="checkbox"/>
LOCATION: Nashville, TN, US					
DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ The Artessa, 17% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
LOCATION: Franklin, TN, US					
DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ The Collins, 16% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$201 - \$1,000	<input checked="" type="checkbox"/>
LOCATION: Charlotte, NC, US					
DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ The Edge, 19% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$201 - \$1,000	<input checked="" type="checkbox"/>
LOCATION: Atlanta, GA, US					
DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					
Chelsea Brooke Rose IRA ⇒ JPMorgan Investor Growth Fund CL C M/F [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Mutual fund held within wife's IRA.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Chelsea Brooke Rose IRA ⇒ Raymond James Bank Deposit Program [BA]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Money market portion of Wife's IRA account.					
CHIPS III AC, LP ⇒ Anthem CityLine, 22% Interest [OL]		\$1,001 - \$15,000	K-1, LP Income	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Richardson, TX, US DESCRIPTION: This property is owned by CHIPS III AC, LP. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property.					
CHIPS III AC, LP, 1% Interest [OL]		\$15,001 - \$50,000	Capital Gains, K-1, LP Income	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Nashville, TN, US DESCRIPTION: This represents the aggregate value of the investment in the LP. The amount of income represents the aggregate distributions from the LP for all assets in the associated Asset Class. The K-1 from this LP reflects a net loss for the year.					
CHIPS III AC, LP ⇒ Legacy at Wakefield, 11% Interest [OL]		\$1,001 - \$15,000	K-1, LP Income	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Raleigh, NC, US DESCRIPTION: This property is owned by CHIPS III AC, LP. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property.					
CHIPS III AC, LP ⇒ Parc at Broad River, 24% Interest [OL]		\$1,001 - \$15,000	K-1, LP Income	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Beaufort, SC, US DESCRIPTION: This property is owned by CHIPS III AC, LP. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property.					
CHIPS III AC, LP ⇒ Riverhouse, 15% Interest [OL]		None	K-1, LP Income	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: Little Rock, AR, US DESCRIPTION: This property is owned by CHIPS III AC, LP. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. This property was sold during the year and the income includes the net sale proceeds.					
CHIPS III AC, LP ⇒ Whitepalm, 20% Interest [OL]		\$1,001 - \$15,000	K-1, LP Income	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Port Orange, FL, US DESCRIPTION: This property is owned by CHIPS III AC, LP. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property.					
Citizens Bank, Carthage, TN Accounts [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Personal and farm operating, interest bearing checking accounts and checking account of spouse.					
Citizens Bank, Carthage, TN Stock [PS]		\$500,001 -	Dividends	\$15,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$1,000,000		\$50,000	
DESCRIPTION: Stock in community bank.					
Danny Conger Farm Note, Liberty, TN [DO]		\$250,001 - \$500,000	Interest	None	<input type="checkbox"/>
DESCRIPTION: Note secured by deed of trust on farm real estate. Liberty, TN.					
Farm Trust [RP]		\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: DeKalb, TN, US DESCRIPTION: Beneficial owner of farm real estate held in trust.					
First Farmers and Merchants Corp., Columbia, TN Stock [PS]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: Stock in community bank.					
First Freedom Bancshares, Lebanon, TN Stock [PS]		\$1,000,001 - \$5,000,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Stock in community bank.					
First Freedom Bank, Lebanon, TN Account [BA]		\$1,000,001 - \$5,000,000	Interest	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Personal money market account.					
First National Bank of Tennessee, Livingston, TN Accounts [BA]		\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Personal interest bearing checking account and personal savings account of dependent child.					
Harper's Point Land Partnership, LP, 9% Interest [OL]		\$100,001 - \$250,000	K-1, LP Income	None	<input type="checkbox"/>
LOCATION: Murfreesboro, TN, US DESCRIPTION: Limited partner in entity that owns undeveloped land in Murfreesboro, TN. There was no income from this partnership for the year. The K-1 from this LP reflects no net income for the year.					
Heyward/HK, LP, 1% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Charleston, SC, US DESCRIPTION: Limited partner in entity that owns multi-family residential development. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year. This property was acquired through a 1031 tax deferred exchange during 2021 upon the sale of Hunter's Creek Apartments, LP and Lofts at Savannah Park.					
John Rose for Tennessee Campaign Loan, Cookeville, TN [DO]		\$1,000,001 - \$5,000,000	None		<input checked="" type="checkbox"/>
DESCRIPTION: Loan to John Rose for Tennessee campaign for Tennessee's 6th District seat in the United States House of Representatives. No interest is presently being charged.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
John Williams Rose RIRA ⇒ AB Relative Value Fund Class A M/F [MF]		\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Bank of America Corporation (BAC) [ST]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Coherent Corp. (COHR) [ST]		\$1 - \$1,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Fidelity Advisor Small Cap Fund Class M M/F [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ FIMM Money Market (FNSXX) [BA]		\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Money market funds within RIRA.					
John Williams Rose RIRA ⇒ Invesco EQV International Equity Fund Class A [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ INVESCO Income Advantage U.S. Fund Class A [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Massachusetts Investors Growth Stock Fund Class C M/F [MF]		\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ MFS Growth Fund Class A M/F [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ MFS Mid Cap Growth Fund Class C M/F [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Microsoft Corporation (MSFT) [ST]		\$100,001 - \$250,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
John Williams Rose RIRA ⇒ Raymond James Bank Deposit Program [BA]		\$1 - \$1,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Thornburg Small Mid Cap Core Fund (TVAFX) [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ VOC Energy Trust Units of Beneficial Interest (VOC) [ST]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
Legacy at Wakefield/HF, LP, 1% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Raleigh, NC, US					
DESCRIPTION: Limited partner in entity that owns multi-family residential development. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a lower net income for the year.					
Nationwide Life Insurance Whole Life Policy [WU]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Cash surrender value of whole life policy on the life of John W. Rose.					
Pavilion Land Partnership, LP, 1% Interest [OL]		\$1,001 - \$15,000	K-1, LP Income	None	<input type="checkbox"/>
LOCATION: Columbia, SC, US					
DESCRIPTION: Limited partner in entity that owns undeveloped land in Columbia, SC. There was no income from this partnership for the year. The K-1 from this LP reflects no net income for the year.					
Pinnacle National Bank, Nashville, TN Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Personal money market account.					
Raymond James Brokerage Account ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Raymond James Brokerage Account ⇒ AMCAP Fund Class A-American Funds M/F [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Capital World Growth & Income Fund Class A-American FD M/F [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒		\$100,001 -	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tax > \$1,000?
Europacific Growth Fund Class A-American Funds M/F [MF]		\$250,000			<input type="checkbox"/>
Raymond James Brokerage Account ⇒ FIMM Money Market (FNSXX) [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Money market funds in brokerage account.					
Raymond James Brokerage Account ⇒ Growth Fund of America Class A-American Funds M/F [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Investment Company of America Class A-American Funds M/F [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Raymond James Client Interest Program [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Smallcap World Fund Class A-American Funds M/F [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Riverhouse/ML-BWP, LP, 1% Interest [OL]		None	K-1, LP Income	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Little Rock, AR, US					
DESCRIPTION: Limited partner in entity that owns multi-family residential development. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year. This property was liquidated during 2022 and income reflects a final distribution of sale proceeds.					
Rose Farm, 100% Interest [FA]		\$5,000,001 - \$25,000,000	Farm Income	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: DeKalb / Smith / Putnam, TN, US					
DESCRIPTION: The farm incurred a net loss in the reporting year. Income reported is gross revenue for the calendar year.					
Smith Fork Ventures, Inc. Demand Note, Nashville, TN [DO]		\$5,000,001 - \$25,000,000	Interest	\$15,001 - \$50,000	<input type="checkbox"/>
DESCRIPTION: Demand note to business.					
Smith Fork Ventures, Inc., Nashville, TN, 92% Interest [OL]		\$5,000,001 - \$25,000,000	K-1, S Corp Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Nashville, TN, US					
DESCRIPTION: Smith Fork Ventures, Inc. wholly owns Boson Holdings, LLC which in turn wholly owns Boson Software, LLC and Boson Training, LLC. All of the Boson LLCs are disregarded entities for tax purposes.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Sun Life Assurance Company Whole Life Policy [WU]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
DESCRIPTION: Cash surrender value of whole life policy on life of John W. Rose.					
Tennessee Farmers Assurance Co., Columbia, TN Stock [PS]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Stock in Tennessee-based property and casualty insurance company affiliated with Tennessee Farm Bureau Federation.					
Tennessee Farmers Life Insurance Company Fixed Annuity [FN]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Fixed annuity.					
Tennessee Farmers Life Insurance Company Universal Life Policy [WU]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: Cash surrender value of universal life policy on life of John W. Rose.					
Tennessee Farmers Life Insurance Co., Columbia, TN Stock [PS]		\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: Stock in Tennessee-based life insurance company affiliated with the Tennessee Farm Bureau Federation.					

\* 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?
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Carter-Haston Multifamily Value Fund V HNW, L.P., 1% Interest [OL]		01/2/2022	P	\$100,001 - \$250,000	
LOCATION: Nashville, TN, US DESCRIPTION: Capital Call for investment in multi-property limited partnership investing in multiple, multi-family residential properties. My ownership percentage of the limited partnership capital is 0.3556492%.					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Carter-Haston Multifamily Value Fund V HNW, L.P., 1% Interest [OL]		08/23/2022	P	\$50,001 - \$100,000	
LOCATION: Nashville, TN, US DESCRIPTION: Capital Call for investment in multi-property limited partnership investing in multiple, multi-family residential properties. My ownership percentage of the limited partnership capital is 0.3556492%.					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Carter-Haston Multifamily Value Fund V HNW, L.P., 1% Interest [OL]		09/15/2022	P	\$50,001 - \$100,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
LOCATION: Nashville, TN, US					
DESCRIPTION: Capital Call for investment in multi-property limited partnership investing in multiple, multi-family residential properties. My ownership percentage of the limited partnership capital is 0.3556492%.					
John Rose for Tennessee Campaign Loan, Cookeville, TN [DO]		11/8/2022	P	\$100,001 - \$250,000	
DESCRIPTION: Additional loan extended to campaign account. No interest is being charged at present.					
John Rose for Tennessee Campaign Loan, Cookeville, TN [DO]		08/2/2022	P	\$100,001 - \$250,000	
DESCRIPTION: Additional loan extended to campaign account. No interest is being charged at present.					
John Williams Rose RIRA ⇒ Continental Resources, Inc. (CLR) [ST]		11/29/2022	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
DESCRIPTION: This transaction was a forced sale as the result of a cash tender offer. Gain over the 15+ year holding period exceeded \$200 but is not taxable given the status of this account.					
John Williams Rose RIRA ⇒ FIMM Money Market (FNSXX) [IR]		11/22/2022	P	\$15,001 - \$50,000	
DESCRIPTION: Transfer of cash from Raymond James Bank Deposit Program to money market fund.					
John Williams Rose RIRA ⇒ FIMM Money Market (FNSXX) [IR]		12/13/2022	P	\$15,001 - \$50,000	
DESCRIPTION: Transfer of cash from Raymond James Bank Deposit Program to money market fund.					
Tennessee Farmers Life Insurance Company [PS]		09/28/2022	P	\$50,001 - \$100,000	
LOCATION: Columbia / Maury, TN, US					
DESCRIPTION: Purchase of unregistered shares in a private treaty transaction.					

\* 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>
Tennessee FFA Foundation, Inc.	Spouses compensation	N/A

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Director	Tennessee Technological University Foundation, Inc. (TN Nonprofit)
Director	Tech Farms, LLC (TN Nonprofit LLC)
Limited Partner	Carter-Haston Investment Partners III AC, LP
Limited Partner	Bay Capital Partners, LP
Limited Partner	Harper's Point Land Partnership, LP
Limited Partner	Legacy at Wakefield/HF, LP
Limited Partner	Pavilion Land Partnership, LP
Limited Partner	Riverhouse/ML-BWP, LP
Limited Partner	Arbor Bend/SC, LP
Member	Packwood Financial Partners, LLC
President	Smith Fork Ventures, Inc.
Commissioner	Tennessee State Fair Commission
COMMENTS: I hold this position under Tennessee state statute as an ex-officio, voting member of the Commission by virtue of my position as Chairman of the Tennessee State Fair Association, a Tennessee, public benefit, nonprofit. This role ended on 2/22/2022.	
Limited Partner	Broad River/MP, LP
Sponsoring Committee Member	Tennessee Future Farmers of America Foundation, Inc.
Limited Partner	Heyward/HK, LP
Limited Partner	Carter-Haston Multifamily Value Fund V HNW, L.P.

## **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**

- Boson Holdings, LLC 401K Plan  
 DESCRIPTION: Boson Holdings, LLC is a single member LLC and wholly owned by Smith Fork Ventures, Inc. The 401k plan investments are managed by American Funds.
- Carter-Haston Multifamily Value Fund V HNW, L.P. (1% Interest)  
 LOCATION: Nashville, Davidson, TN, US  
 DESCRIPTION: Ownership % of capital is 0.3556492% of Limited Partnership.
- Chelsea Brooke Rose IRA (Owner: SP)  
 DESCRIPTION: Raymond James Financial Services IRA of wife.
- CHIPS III AC, LP (1% Interest)  
 LOCATION: Nashville, TN, US  
 DESCRIPTION: Ownership % is 0.432%.
- John Williams Rose RIRA  
 DESCRIPTION: Raymond James Financial Services Roth IRA account.
- Raymond James Brokerage Account (100% Interest)  
 LOCATION: Nashville, TN, US  
 DESCRIPTION: John Williams Rose Brokerage Account.

## **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. John W. Rose , 09/12/2023