



FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Mr. Roger Williams
Status: Member
State/District: TX25

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2013
Filing Date: 05/15/2014

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|--------------------|----------------|-----------------|-------------------------------------|
| Edward Jones Brokerage Account ⇒ Coach, Inc. (COH) | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒ Davis New York Venture Fund CL A | SP | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒ General Electric Company (GE) | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒ Gogo Inc. (GOGO) | SP | \$1,001 - \$15,000 | None | | <input checked="" type="checkbox"/> |
| Edward Jones Brokerage Account ⇒ Invesco Diversified Div Fd A | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒ Invesco Growth & Income Fund CL A | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒ Invesco International Growth Find CL A | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Edward Jones Brokerage Account ⇒ | SP | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-----------------------------|--------------------------------------|----------------------|-------------------------------------|
| Target Corporation (TGT) | | | | | |
| Edward Jones Brokerage Account ⇒ Twitter, Inc. (TWTR) | SP | \$1,001 - \$15,000 | None | | <input checked="" type="checkbox"/> |
| Edward Jones Brokerage Account ⇒ Twitter, Inc. (TWTR) | | \$50,001 - \$100,000 | None | | <input checked="" type="checkbox"/> |
| Edward Jones Brokerage Account ⇒ Walt Disney Company (DIS) | SP | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| Jack Williams Chevrolet ⇒ 500 Main/Williams GP LLC LOCATION: Aledo/Parker, TX, US DESCRIPTION: Real estate | | Undetermined | None | | <input type="checkbox"/> |
| Jack Williams Chevrolet ⇒ 500 Main/Williams, Ltd. LOCATION: Aledo/Parker, TX, US DESCRIPTION: Real estate | | Undetermined | None | | <input type="checkbox"/> |
| Jack Williams Chevrolet ⇒ Jack Williams Chevrolet LOCATION: Fort Worth, TX, US DESCRIPTION: Motor Vehicle Dealership | | None | Interest, Royalties, Auto Dealership | \$50,001 - \$100,000 | <input type="checkbox"/> |
| Jack Williams Chevrolet ⇒ PBC Network Crossing LOCATION: Austin/Travis, TX, US DESCRIPTION: Commercial real estate | | Undetermined | Partnership income | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Jack Williams Chevrolet ⇒ Pershing House LOCATION: Fort Worth/Tarrant, TX, US | | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| Jack Williams Chevrolet ⇒ Walsh House LOCATION: Fort Worth/Tarrant, TX, US | | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| JRW Corporation ⇒ First Texas BHC, Inc. DESCRIPTION: Stock held in JRW Corporation | | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| JRW Corporation ⇒ JRW Corporation & Affiliates | | \$25,000,001 - \$50,000,000 | None | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|---------------------------|--------------------|----------------------|--------------------------|
| LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealer | | | | | |
| JRW II, LLC | | None | None | | <input type="checkbox"/> |
| LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Motor Vehicle Dealer | | | | | |
| Lake House | | \$1,000,001 - \$5,000,000 | None | | <input type="checkbox"/> |
| LOCATION: Marble Falls/Burnet, TX, US | | | | | |
| Museum Collectibles | | \$1,000,001 - \$5,000,000 | None | | <input type="checkbox"/> |
| Note Receivable - Congressional Campaigns | | \$250,001 - \$500,000 | None | | <input type="checkbox"/> |
| Note Receivable - Jack Williams Chevrolet | | \$1,000,001 - \$5,000,000 | Interest | \$50,001 - \$100,000 | <input type="checkbox"/> |
| Note Receivable - Vestry Corporation Weatherford, TX | | \$250,001 - \$500,000 | Interest | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Pedernales Electric Cooperative | | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |
| DESCRIPTION: Electric cooperative | | | | | |
| Personal Checking Account - Chase Bank | | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| Personal Checking Account- Legacy Texas Bank | SP | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Personal Money Market Account- Legacy Texas Bank | SP | \$15,001 - \$50,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Personal Money Market Account- Legacy Texas Bank | JT | \$15,001 - \$50,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Personal residence | | \$1,000,001 - \$5,000,000 | None | | <input type="checkbox"/> |
| LOCATION: Weatherford/Parker, TX, US | | | | | |
| Quintana Energy Partners | | \$500,001 - \$1,000,000 | Partnership Income | \$50,001 - \$100,000 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|--------------|---------------------------|---------------------------------|-------------------------|--------------------------|
| LOCATION: Houston/Harris, TX, US DESCRIPTION: Oil & Gas | | | | | |
| Renzel Boulevard Car Wash ⇒ Renzel Boulevard Car Wash | | None | Interest | \$1 - \$200 | <input type="checkbox"/> |
| LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Motor Vehicle Dealer | | | | | |
| Vestry Corporation ⇒ Palo Pinto Ranch | | \$1,000,001 - \$5,000,000 | None | | <input type="checkbox"/> |
| LOCATION: Graford/Palo Pinto, TX, US | | | | | |
| Vestry Corporation ⇒ The Blackstone Group L.P. | | \$15,001 - \$50,000 | Partnership Income | \$201 - \$1,000 | <input type="checkbox"/> |
| LOCATION: New York/New York, NY, US DESCRIPTION: Investment and advisory firm | | | | | |
| Vestry Corporation ⇒ Vestry Corporation | | None | Interest, Warranties | \$100,001 - \$1,000,000 | <input type="checkbox"/> |
| LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealership | | | | | |
| Williams Chrysler Plymouth Dodge ⇒ Rental Property | | \$100,001 - \$250,000 | Rent | \$15,001 - \$50,000 | <input type="checkbox"/> |
| LOCATION: Weatherford/Parker, TX, US | | | | | |
| Williams Chrysler Plymouth Dodge ⇒ Roger Williams Chrysler Plymouth Dodge | | None | Interest, Auto Dealership, Rent | \$100,001 - \$1,000,000 | <input type="checkbox"/> |
| LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealer | | | | | |
| Williams Irrevocable Life Insurance Trust ⇒ Williams Irrevocable Insurance Trust: Fort Worth, TX | | \$250,001 - \$500,000 | None | | <input type="checkbox"/> |
| DESCRIPTION: Life insurance policy (cash surrender value) | | | | | |
| Xponential, Inc. (XPOI) | | \$15,001 - \$50,000 | None | | <input type="checkbox"/> |

* Asset class details available at the bottom of this form.

SCHEDULE B: TRANSACTIONS

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > \$200? |
|---|-------|------------|----------|---------------------|---------------------|
| Edward Jones Brokerage Account ⇒ Gogo Inc. (GOGO) | SP | 12/24/2013 | P | \$1,001 - \$15,000 | |
| Edward Jones Brokerage Account ⇒ Twitter, Inc. (TWTR) | | 11/18/2013 | P | \$15,001 - \$50,000 | |
| Edward Jones Brokerage Account ⇒ Twitter, Inc. (TWTR) | SP | 11/18/2013 | P | \$1,001 - \$15,000 | |

* Asset class details available at the bottom of this form.

SCHEDULE C: EARNED INCOME

| Source | Type | Amount |
|-----------------------|---------------|-------------|
| Williams Chrysler LP | Salary | \$26,332.84 |
| Williams Chrysler LP | Spouse Salary | N/A |
| P.K. Flowers Interior | Spouse Salary | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|--|----------------|--|---------------------------|
| | Roger Williams (Jack Williams Chevrolet) | October 2012 | Note Payable | \$1,000,001 - \$5,000,000 |
| | Roger Williams (Vestry) | July 1995 | Note Payable | \$250,001 - \$500,000 |
| | Legacy Texas Bank | September 2009 | Line of Credit | \$1,000,001 - \$5,000,000 |
| | Legacy Texas Bank | December 2011 | Line of Credit | \$500,001 - \$1,000,000 |
| | Legacy Texas Bank | September 2012 | Mortgage on Personal Residence (Horseshoe Bay) | \$250,001 - \$500,000 |
| SP | Legacy Texas Bank | May 2013 | Personal loan | \$10,000 - \$15,000 |
| | Legacy Texas Bank | December 2009 | Line of Credit | \$1,000,001 - \$5,000,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|--|--|
| Sole Director & President | JRW Corporation |
| Sole Manager & President | Williams Chrysler, LP |
| Sole Manager & President | Williams Chrysler Holding, LLC |
| Sole Manager & President | Vestry Holding, LLC |
| Sole Manager & President | Jack Williams Chevrolet Holding, LLC |
| Sole Manager & President | Vestry, LP |
| Sole Manager & President | Jack Williams Chevrolet, LP |
| Sole Manager & President | JRW II, LLC |
| Director, President, Chairman, & Secretary | Renzel Boulevard Car Wash, Inc |
| Steering Committee | USS Ft. Worth |
| Board of Directors | Pennybacker Capital |
| 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 Football Foundation and College Football Hall of Fame |
| Finance Committee | George W. Bush Presidential Center |

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

- o Edward Jones Brokerage Account (Owner: SP)
LOCATION: US

- o Edward Jones Brokerage Account
LOCATION: US
- o Jack Williams Chevrolet
LOCATION: US
- o JRW Corporation
LOCATION: US
- o Renzel Boulevard Car Wash
LOCATION: US
- o Vestry Corporation
LOCATION: US
- o Williams Chrysler Plymouth Dodge
LOCATION: US
- o 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

COMMENTS

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: Mr. Roger Williams , 05/15/2014