



Filing ID #10059583

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Brokerage Account ⇒ Chevron Corporation (CVX) [ST]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Diamondback Energy, Inc. - Common Stock (FANG) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Edward Jones Brokerage Account ⇒ Personal Cash Account Edward [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ American Airlines Group, Inc. (AAL) [ST]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Berkshire Hathaway Inc. (BRK.A) [ST]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ ChargePoint Holdings, Inc. (CHPT) [ST]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Chevron Corporation (CVX) [ST]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Federated Hermes Prime Cash Obligations Fund Wealth Shares (PCOXX) [MF]					
Edward Jones Brokerage Account 5612 ⇒ Invesco Diversified Div Fd A [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Invesco Growth and Income A [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Invesco International Growth CL A [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ NOV Inc. (NOV) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Pfizer, Inc. (PFE) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Procter & Gamble Company (PG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Stellantis N.V. Common Shares (STLA) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Viatris Inc. (VTRS) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 5612 ⇒ Westinghouse Air Brake Technologies Corporation (WAB) [ST]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ American Fundamental Invs F3 [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ American Funds Tax Exempt F3 [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Blackrock National Municipal [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Caney Creek Tex Mun Util Dist [CS]					
DESCRIPTION: Municipal Bond					
Edward Jones Brokerage Account 8214 ⇒ Eli Lilly and Company (LLY) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Hartford Divid and Growth Cl F [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco Comstock R6 [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Invesco High Yield Municipal [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Ishares Core MSCI Emerging Markets ETF [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ iShares MSCI EAFE Growth ETF (EFG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ iShares MSCI EAFE Value ETF (EFV) [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ JP Morgan Chase & Co. (JPM) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Meta Platforms, Inc. - Class A (META) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ MFS Growth R6 [MF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ NVIDIA Corporation (NVDA) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Personal Cash Account Edward [BA]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Sunshine Biopharma Inc. - Common stock (SBFM) [ST]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Truist Financial Corporation (TFC) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Edward Jones Brokerage Account 8214 ⇒ Vanguard FTSE AllWorld [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard FTSE Developed Markets ETF [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Growth ETF (VUG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Mid Cap ETF [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard SmallCap Growth ETF (VBK) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Small-Cap Value ETF (VBR) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Vanguard Value ETF [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Brokerage Account 8214 ⇒ Western Asset Managed [EF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Jack Williams Chevrolet ⇒ 500 Main/Williams GP [OL] LOCATION: Aledo/Parker, TX, US DESCRIPTION: Real Estate		\$1,001 - \$15,000	None		<input type="checkbox"/>
Jack Williams Chevrolet ⇒ 500 Main/Williams, Ltd. [OL] LOCATION: Aledo/Parker, TX, US DESCRIPTION: Real Estate		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Jack Williams Chevrolet ⇒ Jack Williams Chevrolet, Inc. [OL] LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Motor Vehicle Dealership		\$1 - \$1,000	Interest, Royalties, Auto Dealership, Gains and Losses	None	<input type="checkbox"/>
JRW Corporation ⇒ First Texas BHC, Inc. [PS] DESCRIPTION: Stock held in JRW Corporation		\$50,001 - \$100,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JRW Corporation ⇒ JRW Corporation & Affiliates [OL] LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealer		Over \$50,000,000	None		<input type="checkbox"/>
JRW II, LLC [OL] LOCATION: FORT WORTH/TARRANT, TX, US DESCRIPTION: MOTOR VEHICLE DEALER		\$1 - \$1,000	None		<input type="checkbox"/>
LAKE HOUSE [RP] LOCATION: MARBLE FALLS/BURNET, TX, US		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
MUSEUM COLLECTIBLES [CO] DESCRIPTION: Sports memorabilia, political & military artifacts, historical documents & photographs, & art		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
Note Receivable - Vestry Corporation [DO]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Note Receivable - Williams Chrysler Dodge Jeep [DO]		\$1,000,001 - \$5,000,000	Interest	\$50,001 - \$100,000	<input type="checkbox"/>
Pedernales Electric Cooperative [OT] DESCRIPTION: Electric cooperative		\$1,001 - \$15,000	None		<input type="checkbox"/>
Personal Checking Account Legacy [BA]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Personal Checking Account Legacy [BA]	SP	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Personal Residence [RP] LOCATION: Weatherford/Parker, TX, US		\$5,000,001 - \$25,000,000	None		<input type="checkbox"/>
Renzel Boulevard Car Wash ⇒ Renzel Boulevard Car Wash [OL] LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Car Wash		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
Vestry Corporation ⇒ Hawk [OL] LOCATION: Fort Worth/Tarrant, TX, US		\$5,000,001 - \$25,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Aircraft Leasing					
Vestry Corporation ⇒ Patriot [OL]		\$500,001 - \$1,000,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Aircraft leasing					
Vestry Corporation ⇒ Vestry Corporation [OL]		\$1 - \$1,000	Interest, Warranties	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealership					
Williams Chrysler Plymouth Dodge ⇒ Rental Property [RP]		\$5,000,001 - \$25,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US					
Williams Chrysler Plymouth Dodge ⇒ Williams Chrysler Plymouth Dodge [OL]		\$5,000,001 - \$25,000,000	Auto Dealership	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
LOCATION: Weatherford/Parker, TX, US DESCRIPTION: Motor Vehicle Dealer					
Williams Irrevocable Life Insurance Trust ⇒ Williams Family Irrevocable Trust [OL]		\$15,001 - \$50,000	Unearned Interest	None	<input type="checkbox"/>
LOCATION: Fort Worth/Tarrant, TX, US DESCRIPTION: Life insurance policy (cash surrender value)					
Williams Irrevocable Life Insurance Trust ⇒ Williams Irrevocable Insurance Trust [OL]		\$250,001 - \$500,000	Unearned Interest	None	<input type="checkbox"/>
LOCATION: Fort Worth, TX, US DESCRIPTION: Life insurance policy (cash surrender value)					

* Investment vehicle 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?
Edward Jones Brokerage Account 5612 ⇒ Federated Hermes Prime Cash Obligations Fund Wealth Shares (PCOXX) [MF]	SP	06/30/2023	P	\$1,001 - \$15,000	
DESCRIPTION: Mutual Fund					

* Investment vehicle 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
Williams Chrysler LP	Spouse Salary	\$109,696.09

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Roger Williams (RWCJD)	March 2009	Note Payable	\$1,000,001 - \$5,000,000
	Roger Williams (Vestry)	July 1995	Note Payable	\$500,001 - \$1,000,000
	Truist Bank	October 2015	Primary Residence Mortgage	\$250,001 - \$500,000
	US Bank	June 2021	Land Loan	\$500,001 - \$1,000,000
	First Financial Bank	June 2022	Line of Credit	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Sole Director & President	JRW Corporation
Sole Director & President	Williams Chrysler, LP
Sole Director & President	Williams Chrysler Holding, LLC
Sole Director & President	Vestry Holding, LLC
Sole Director & President	Jack Williams Chevrolet Holding, LLC
Sole Director & President	JRW II, LLC
Director, President, Chairman, & Secretary	Renzel Boulevard Car Wash, Inc.
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 Foundation and College Football Hall of Fame

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 INVESTMENT VEHICLE DETAILS

- Edward Jones Brokerage Account
LOCATION: US
- Edward Jones Brokerage Account 5612 (Owner: SP)
LOCATION: US
- Edward Jones Brokerage Account 8214 (Owner: SP)
LOCATION: US
- Jack Williams Chevrolet
LOCATION: US
- JRW Corporation
LOCATION: US
- Renzel Boulevard Car Wash
LOCATION: US
- Vestry Corporation
LOCATION: US
- Williams Chrysler Plymouth Dodge
LOCATION: US
- 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

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. Roger Williams , 05/15/2024