



Filing ID #10062654

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. James E Hon Banks
Status: Member
State/District: IN03

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/13/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Grace Schools IRA - Money Market [IH]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
INDIANA 529 ⇒ College Choice 529 (Age-based option growth portfolio 100%) [5P] LOCATION: IN DESCRIPTION: Elizabeth Banks		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
INDIANA 529 ⇒ College Choice 529 (Age-based option growth portfolio 100%) [5P] LOCATION: IN DESCRIPTION: Lillian Banks		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
INDIANA 529 ⇒ College Choice 529 (Age-based option growth portfolio 100%) [5P] LOCATION: IN DESCRIPTION: Joann Banks		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Indiana Deferred Compensation Account [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
INPRS Legislators' Defined Contribution Fund [MF]		\$50,001 -	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: 2045 Retirement Fund		\$100,000			<input type="checkbox"/>
INPRS Legislators' Defined Contribution Plan [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: 2045 Retirement Fund					
IRA ⇒ Vaneck Morningstar Wide Moat ETF [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Peloton Interactive, Inc. (PTON) [ST]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
ReliaStar Life Insurance [WU]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
Roblox Corporation Class A (RBLX) [ST]	JT	\$1 - \$1,000	None		<input type="checkbox"/>
Roth IRA ⇒ Vaneck Morningstar Wide Moat ETF [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Schwab IRA ⇒ Patient Access Solutions Inc. (PASO) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Schwab IRA ⇒ Peloton Interactive, Inc. (PTON) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Indiana Public Employee Deferred Compensation Plan [MF]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Indiana 2040 Fund					
Vaneck Vectors Morningstar Wide Moat ETF [MF]		\$15,001 - \$50,000	None		<input type="checkbox"/>

* 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?
Schwab IRA ⇒ Peloton Interactive, Inc. (PTON) [ST]		06/9/2023	P	\$1,001 - \$15,000	

* 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
Family Policy Foundation	Spouse salary	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Dovenmuehle	June 2020	Mortgage on VA residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2017	INPRS - Indiana Public Retirement System	Continued participation in retirement account

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Enterprise Institute	03/11/2023	03/12/2023	New York, NY - Sea Island, GA - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

◦ INDIANA 529 LOCATION: IN

- IRA (Owner: SP)
- Roth IRA (Owner: SP)
- Schwab IRA

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. James E Hon Banks , 08/13/2024