



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Lindsay James
Status: Congressional Candidate
State/District: IA02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2025
Filing Date: 12/10/2025
Period Covered: 01/01/2024– 08/19/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|----------------|-------------------------------|-----------------------|
| Apple Inc. - Common Stock (AAPL) [ST] | JT | \$15,001 - \$50,000 | Dividends | \$1 - \$200 | \$1 - \$200 |
| Ariel Fund Investor Cl (ARGFX) [MF] DESCRIPTION: ROTH IRA | | \$1,001 - \$15,000 | None | | |
| Calvert Global Water Fund Class A (CFWAX) [MF] DESCRIPTION: ROTH IRA | | \$100,001 - \$250,000 | None | | |
| Capitol One Checking Giving [BA] | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | \$1 - \$200 |
| Capitol One Checking Savings [BA] | JT | \$1,001 - \$15,000 | Interest | \$201 - \$1,000 | \$201 - \$1,000 |
| Capitol One Savings [BA] | JT | \$1,001 - \$15,000 | Interest | \$201 - \$1,000 | \$201 - \$1,000 |
| Church Planting in Post-Christian Soil [IP] | SP | Undetermined | royalty | \$1 - \$200 | \$201 - \$1,000 |
| Credit Karma (MVB Bank) Savings account [BA] | SP | None | Interest | \$1 - \$200 | \$1 - \$200 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-----------------------|----------------|-------------------------------|-----------------------|
| DESCRIPTION: Account closed 12/6/2025 | | | | | |
| DUPACO for Ginny [BA] | JT | \$1,001 - \$15,000 | None | | |
| IPERS [DB] | | \$15,001 - \$50,000 | None | | |
| Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF] | SP | \$50,001 - \$100,000 | None | | |
| DESCRIPTION: ROTH IRA | | | | | |
| UMB Bank Checking [BA] | JT | \$1,001 - \$15,000 | None | | |
| Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF] | SP | \$50,001 - \$100,000 | None | | |
| DESCRIPTION: ROTH IRA | | | | | |
| Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF] | SP | \$100,001 - \$250,000 | None | | |
| DESCRIPTION: 403(b) | | | | | |
| Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF] | SP | \$15,001 - \$50,000 | None | | |
| DESCRIPTION: UTMA for Virginia | | | | | |
| Vanguard FTSE Social Index Fund Admiral Shares (VFTAX) [MF] | SP | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: UTMA for Luke | | | | | |
| Vanguard Global ESG Select Stock Fund Investor Shares (VEIGX) [MF] | | \$1,001 - \$15,000 | None | | |
| DESCRIPTION: ROTH IRA | | | | | |

* 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 |
|-----------------------|----------------------------|-------------------------------|-----------------------|
| State of Iowa | Salary | \$25,000.00 | \$25,000.00 |
| University of Dubuque | Spouse Salary | N/A | N/A |
| St. Andrews Hall | Spouse Teaching Honorarium | \$.00 | \$1,445.00 |

| | | | |
|-----------------------------------|---------------------------|-----|----------|
| SL Brown Foundation / Upper House | Spouse Speaking Honoraria | N/A | \$500.00 |
|-----------------------------------|---------------------------|-----|----------|

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|-------------|---------------|-------------------|---------------------|
| JT | David James | April 2024 | Personal Car Loan | \$15,001 - \$50,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|--------------|------------------------|
| Board Member | Iowa Finance Authority |

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|--------------|---|---|
| January 2018 | State of Iowa / Lindsay James | IPERS retirement account |
| January 2015 | University of Dubuque / Christopher James | University matches 5% employee contributions to 503b with 7% contributions. |

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

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: Lindsay James , 12/10/2025