

UNITED STATES HOUSE OF REPRESENTATIVES FINANCIAL DISCLOSURE REPORT	FORM B For New Members Candidates and New Employees
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LEGISLATIVE RESOURCE CENTER

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U.S. HOUSE OF REPRESENTATIVES
(Office Use Only)

Name Joseph P Mitchell Daytime Telephone 508 225 3333

FILER STATUS	☒ New Member of or Candidate for U S House of Representatives State <u>Iowa</u> District <u>2</u> Candidates – Date of Election <u>November 3, 2026</u>	☐ Check if Amendment	A \$200 penalty shall be assessed against any individual who files more than 30-days late
	☐ New Officer or Employee Staff Filer Type (If Applicable) Employing Office _____ Shared ☐ Principal Assistant ☐	Period Covered January 1 <u>2025</u> to July 31 <u>2026</u>	

PRELIMINARY INFORMATION – ANSWER EACH OF THESE QUESTIONS

A Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? or b. Receive more than \$200 in unearned income from any reportable asset during the reporting period? Yes ☒ No ☐	E Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing? Yes ☒ No ☐
C Did you or your spouse have earned income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period? Yes ☒ No ☐	F Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing? Yes ☒ No ☐
D Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period? Yes ☒ No ☐	J Did you receive compensation of more than \$5,000 from a single source in the current year and two prior years? Yes ☒ No ☐

ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER YES

THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION – ANSWER BOTH OF THESE QUESTIONS

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 that benefits you, your spouse, or dependent child?	Yes ☐ No ☒
EXEMPTION – Have you excluded from this report any other assets, unearned income, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer “yes” unless you have first consulted with the Committee on Ethics.	Yes ☐ No ☒

SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name Joseph P Mitchell

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BLOCK A			BLOCK B													BLOCK C								BLOCK D																																	
Assets and/or Income Sources			Value of Asset													Type of Income								Amount of Income																																	
																								Current Year												Preceding Year																					
			A	B	C	D	E	F	G	H	I	J	K	L	M									I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII										
SP	DC	JT	ASSET NAME	EIF	Non	\$1-\$1,000	\$1,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	\$1,000,001-\$5,000,000	\$5,000,001-\$25,000,000	\$25,000,001-\$50,000,000	O	\$50,000,000	Spouse/DC Asset over \$1,000,000	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify e.g. Partnership Income or Farm Income)	N	\$1-\$200	\$201-\$1,000	\$1,001-\$2,500	\$2,501-\$5,000	\$5,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$1,000,000	\$1,000,001-\$5,000,000	Over \$5,000,000	Spouse/DC Income over \$1,000,000	None	\$1-\$200	\$201-\$1,000	\$1,001-\$2,500	\$2,501-\$5,000	\$5,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$1,000,000	\$1,000,001-\$5,000,000	Over \$5,000,000	Spouse/DC Income over \$1,000,000							
			BAM Development LLC (Iowa Real Estate Development, Management & Holding)										X					X									X											X																			
			FIDELITY GOVERNMENT CASH RESERVES	X			X												X					X					X											X																	
			ISHARES US EQUITY FACTOR ROTATION ACTIVE ETF	X			X												X				X							X											X																
			ISHARES CORE S&P 500 ETF	X				X											X				X							X												X															
			Roth IRA - Blackrock ETF Trust Shares AI Innovation & Tech	X	X																					X		X											X																		
			ISHARES CORE MSCI EMERGING MARKETS ETF	X		X													X										X											X																	
			Fidelity Enhanced Large Cap Growth ETF	X			X												X										X											X																	
			Roth IRA - Fidelity US Equity Fund	X			X																			X			X											X																	
			Investco Exchange Traded Fund II S&P 500	X	X														X										X											X																	
			Fidelity Large Cap Value Active ETF	X	X														X										X											X																	
			Ishares S&P 100 ETF	X	X														X										X											X																	
			Roth IRA - iShares TR US AER DEF ETF	X	X														X										X											X																	
			Roth IRA - LEGG MONTGOMERY & CO. I II LW	X	X														X										X											X																	
			Investco Exchange Traded Fund II S&P II	X		X													X										X											X																	
			Roth IRA - Fidelity Government Cash Reserves	X		X													X										X											X																	
			Roth IRA - iShares Large Cap Core Active ETF	X			X												X										X											X																	

Use additional sheets if more space is required

SCHEDULE A – ASSETS & UNEARNED INCOME

Name **Joseph P Mitchell**

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SCHEDULE C – EARNED INCOME

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List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. government) totaling \$200 or more during the reporting period. For both the filer and filer's spouse, list the source and amount of any honoraria. List only the source for other spouses' earned income exceeding \$1,000. See examples below.

EXCLUDE: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

INCOME LIMITS and PROHIBITED INCOME: Be advised that the outside earned income limit and prohibitions on types of income may apply to you after you are on House payroll. The 2024 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$31,815. The 2025 limit is \$33,285. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited for Members and senior staff.

Source (include date of receipt for honoraria)		Type	Amount	
			Current Year to Filing	Preceding Year
Examples	ABC T d Associ b Baltimore MD (J ly 15)	H nora um	\$0	\$500
	Stat of M ryl d	Sal ry	\$20,000	\$76,000
	Civil War R dt ble (Oct 2)	Spo e Sp ech	\$0	\$1,000
	O la Cou ty Board f Ed cati	Spo se S l ry	N/A	N/A
Harvard University		Salary	None	\$20,000
Housing and Urban Development		Salary	None	\$67,700
Iowa Real Estate Developers Association		Consulting Fees	None	\$4,200
Kaoh Media Enterprises		Consulting Fees	None	\$37,500
Federal Housing Finance Agency Chief of Staff		Salary	None	\$47,900

SCHEDULE D – LIABILITIES

Name Joseph P Mitchell

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Report liabilities of over \$10 000 owed to any one creditor **at any time** during the reporting period by you, your spouse, or your dependent children. **Mark the highest amount owed during the reporting period.** **New Members:** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a **revolving charge account** (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10 000. Column K is for liabilities held solely by your spouse or dependent children.

SP DC JT	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability										
				A	B	C	D	E	F	G	H	I	J	K
				\$10 001 \$15 000	\$15 001 \$50 000	\$50 001 \$100 000	\$100 001 \$250 000	\$250 001 \$500 000	\$500 001 \$1 000 000	\$1 000 001 \$5 000 000	\$5 000 001 \$25 000 000	\$25 000 001 \$50 000 000	Over \$50 000 000	Over \$1 000 000 (Spouse/DC Liability)
	Ex mple First Bank of Wilmington, DE	5/20	Mortgage on Real Property, DE				X							
	Pilot Grove Savings Bank #1	2020	Mtg on Rental, paid off during period			X								
	Pilot Grove Savings Bank #2	2021	Mtg on Rental, paid off during period			X								
	Pilot Grove Savings Bank #3	2021	Mtg on Rental, paid off during period				X							
	Farmers & Merchants #1	2022	Mtg on Rental, paid off during period			X								
	Farmers & Merchants #2	2023	Mtg on Rental, paid off during period			X								

More listed on Filers Notes

SCHEDULE E – POSITIONS

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude:** Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations) and positions solely of an honorary nature. **New Members and second year candidates** report positions held in the reporting period and the current calendar year. **First-year candidates and new employees** report positions held in the current calendar year and two previous years.

Position	Name of Organization
Managing Partner	J Mitchell Real Estate
Partner	BAM Development
Partner	Monroe Street Landing
Partner	Emerald Cove LLC
Partner	Bousselot & Mitchell Company

More Listed on Filers notes

Use additional sheets if more space is required

SCHEDULE F – AGREEMENTS

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Identify the date parties to and general terms of any agreement or arrangement that you have with respect to future employment a leave of absence during the period of government service continuation or deferral of payments by a former or current employer other than the U S government or continuing participation in an employee welfare or benefit plan maintained by a former employer

Date	Parties to Agreement	Terms of Agreement
01/2019	Iowa Public Employee Retirement System	Previously participated in the Iowa Public Employee Retirement System This Pension vests after 7 years of employment which I did not meet but it does have a cash balance that I could rollover/ cash out I am leaving that in that pension system

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

Report sources of compensation received by you or your business affiliation for services provided directly by you during the current year and two prior years This includes the names of clients and customers of any corporation firm partnership or other business enterprise if you directly provided the services generating a fee or payment of more than \$5 000 **Exclude** Payments by the U S government and any information considered confidential as a result of a privileged relationship recognized by law **Do not repeat the information listed on Schedule C**

Source (Name and City/State)	Brief Description of Duties
<i>Ex mpl</i> Doe Jones & Smith Hometown State	Accounting Services
All compensation has been reported on Schedule C	

FILER NOTES
(Optional)

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NOTE NUMBER	NOTES				
	<u>Continuation of Schedule D</u>				
	Liability	Year	Description	Amount	
	Farmers and Merchants #3	2024	Mortgage on rental property	50k 100k	(Paid off during reporting period)
	Farmers and Merchants #4	2024	Mortgage on rental property	50k 100k	(Paid off during reporting period)
	Farmers & Merchants #5	2023	Mortgage on rental property (Monroe Street Landing)	1M 5M	(Paid off during reporting period)
	Farmers & Merchants #6	2025	Mortgages on several rental properties	1M 5M	(for rental properties in J Mitchell Real Estate & Monroe Street Landing)
	United Fidelity (Fannie Mae)	2026	Mortgage on rental property	\$250k 500k	
	<u>Continuation of Schedule E</u>				
	Position	Org Name			
	Chairman/Executive Director	Iowa Real Estate Developers Association		(no longer in role at end of reporting period)	
	Board Member	ALEC action		(no longer in role at end of reporting period)	
	Community Advocate	RWE		(no longer in role at end of reporting period)	
	Resident Fellow	Harvard		(no longer in role at end of reporting period)	

Use additional sheets if more space is required