



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Justin Amash  
**Status:** Member  
**State/District:** MI03

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2019  
**Filing Date:** 08/13/2020

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab Investment Account ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR MidCap Trust Series I (MDY) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account ⇒ SPDR S&P 500 (SPY) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Amazon.com, Inc. (AMZN) [ST]	DC	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Cash [BA]	DC	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Sonos, Inc. (SONO) [ST]	DC	\$15,001 - \$50,000	Dividends	None	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒	DC	\$50,001 -	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
SPDR MidCap Trust Series I (MDY) [EF]		\$100,000			
Charles Schwab Investment Account - DC1 ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ Walt Disney Company (DIS) [ST]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Amazon.com, Inc. (AMZN) [ST]	DC	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Apple Inc. (AAPL) [ST]	DC	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Cash [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ SPDR MidCap Trust Series I (MDY) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Walt Disney Company (DIS) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Amazon.com, Inc. (AMZN) [ST]	DC	\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Cash [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Nintendo Co Ltd ADR (NTDOY) [ST]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ SPDR MidCap Trust Series I (MDY) [EF]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Charles Schwab Investment Account - DC3 ⇒ SPDR S&P 500 (SPY) [EF]	DC	\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Walt Disney Company (DIS) [ST]	DC	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Investments 401(k) Plan ⇒ Fidelity 500 Index Fund (FXAIX) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Investments 401(k) Plan ⇒ Fidelity Extended Market Index Fund (FSMAX) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fifth Third Bank Checking Account [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Standard Bear, LLC ⇒ Commercial Real Estate [RP]  LOCATION: Caledonia, MI, US		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
Standard Bear, LLC ⇒ Independent Bank Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Standard Bear, LLC ⇒ Miscellaneous [OT]  DESCRIPTION: Intangible		\$1,001 - \$15,000	Intangible	\$1,001 - \$2,500	<input type="checkbox"/>
Standard Bear, LLC ⇒ Note [DO]  DESCRIPTION: Loan to Tekton, Inc., Wyoming, MI		\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
State of Michigan/Voya 401(k) Plan ⇒ BlackRock S&P SmallCap Index Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Michigan/Voya 401(k) Plan ⇒ State Street S&P 500 Index Fund [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
State of Michigan/Voya 401(k) Plan ⇒ State Street S&P MidCap Index Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Michigan/Voya 457 Plan ⇒ BlackRock S&P SmallCap Index Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
State of Michigan/Voya 457 Plan ⇒ State Street S&P 500 Index Fund [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
State of Michigan/Voya 457 Plan ⇒ State Street S&P MidCap Index Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Tekton, Inc. [OL]		\$1,000,001 - \$5,000,000	S Corporation	None	<input type="checkbox"/>
LOCATION: Wyoming, MI, US					
DESCRIPTION: Distributor					

\* Asset class 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?
Charles Schwab Investment Account ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		02/1/2019	P	\$1,001 - \$15,000	
Charles Schwab Investment Account ⇒ SPDR MidCap Trust Series I (MDY) [EF]		01/2/2019	P	\$1,001 - \$15,000	
Charles Schwab Investment Account - DC1 ⇒ Amazon.com, Inc. (AMZN) [ST]	DC	01/2/2019	P	\$1,001 - \$15,000	
Charles Schwab Investment Account - DC1 ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	DC	05/1/2019	P	\$1,001 - \$15,000	
Charles Schwab Investment Account - DC1 ⇒ Sonos, Inc. (SONO) [ST]	DC	01/2/2019	P	\$1,001 - \$15,000	
Charles Schwab Investment Account - DC1 ⇒ SPDR MidCap Trust Series I (MDY) [EF]	DC	05/1/2019	P	\$1,001 - \$15,000	
Charles Schwab Investment Account - DC1 ⇒ SPDR S&P 500 (SPY) [EF]	DC	01/2/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC1 ⇒ SPDR S&P 500 (SPY) [EF]	DC	04/15/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Apple Inc. (AAPL) [ST]	DC	01/2/2019	P	\$1,001 - \$15,000	
Charles Schwab Investment Account - DC2 ⇒ SPDR S&P 500 (SPY) [EF]	DC	01/2/2019	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Charles Schwab Investment Account - DC2 ⇒ SPDR S&P 500 (SPY) [EF]	DC	04/15/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC2 ⇒ Walt Disney Company (DIS) [ST]	DC	01/2/2019	P	\$1,001 - \$15,000	
Charles Schwab Investment Account - DC3 ⇒ Nintendo Co Ltd ADR (NTDOY) [ST]	DC	05/1/2019	P	\$1,001 - \$15,000	
Charles Schwab Investment Account - DC3 ⇒ SPDR S&P 500 (SPY) [EF]	DC	01/2/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ SPDR S&P 500 (SPY) [EF]	DC	04/15/2019	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Charles Schwab Investment Account - DC3 ⇒ Walt Disney Company (DIS) [ST]	DC	01/2/2019	P	\$1,001 - \$15,000	

\* Asset class 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

None disclosed.

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Fifth Third Bank	July 2004	Personal Residence Equity Line	\$100,001 - \$250,000
	Fifth Third Bank	October 2014	Personal Residence Mortgage	\$100,001 - \$250,000
	Chemical Bank	May 2016	Commercial Real Estate Mortgage (via Standard Bear, LLC)	\$500,001 - \$1,000,000
	Independent Bank	March 2019	Commercial Real Estate Mortgage (via Standard Bear, LLC)	\$500,001 - \$1,000,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Owner of Minority Interest	Tekton, Inc.
Member	Standard Bear, LLC

### **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 Charles Schwab Investment Account  
LOCATION: US
- o Charles Schwab Investment Account - DC1 (Owner: DC)  
LOCATION: US
- o Charles Schwab Investment Account - DC2 (Owner: DC)  
LOCATION: US
- o Charles Schwab Investment Account - DC3 (Owner: DC)  
LOCATION: US
- o Fidelity Investments 401(k) Plan
- o Standard Bear, LLC  
LOCATION: Grand Rapids, MI, US
- o State of Michigan/Voya 401(k) Plan
- o State of Michigan/Voya 457 Plan

### **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. Justin Amash , 08/13/2020