



Filing ID #10055646

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Charles Goodrich  
**Status:** Congressional Candidate  
**State/District:** IN05

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2023  
**Filing Date:** 08/13/2023  
**Period Covered:** 01/01/2022– 07/15/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Beacon Credit Union, Bank Account [BA]		\$100,001 - \$250,000	None		
CJI Investments, LLC [OL]  LOCATION: Indianapolis, IN, US DESCRIPTION: Private oil exploration		\$250,001 - \$500,000	None		
Edward Jones Brokerage Account #1 ⇒ American Funds Capital World Growth and Income Fund Class A (CWGIX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Edward Jones Brokerage Account #1 ⇒ American Funds The Growth Fund of America Class A (AGTHX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Edward Jones Brokerage Account #1 ⇒ Generac Holdings Inc. (GNRC) [ST]	JT	\$1,001 - \$15,000	Dividends	None	None
Edward Jones Brokerage Account #1 ⇒ Invesco Short Duration High Yield Municipal Fund Class A (ISHAX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Edward Jones Brokerage Account #1 ⇒ Marathon Petroleum Corporation (MPC) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Edward Jones Brokerage Account #1 ⇒ Money Market Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Edward Jones Brokerage Account #1 ⇒ NextEra Energy, Inc. (NEE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Edward Jones Brokerage Account #1 ⇒ ONEOK, Inc. (OKE) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Edward Jones Brokerage Account #1 ⇒ Oracle Corporation (ORCL) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Edward Jones IRA #1 ⇒ American Funds Capital World Growth and Income Fund Class A (CWGIX) [MF]		\$1 - \$1,000	Tax-Deferred		
Edward Jones IRA #1 ⇒ American Funds The Growth Fund of America Class A (AGTHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Edward Jones IRA #1 ⇒ Oracle Corporation (ORCL) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Gaylor Electric 401(k) ⇒ Flexpath Retirement Plan Year 2035 [MF] DESCRIPTION: Target Date Fund		\$500,001 - \$1,000,000	Tax-Deferred		
Gaylor Electric, Inc. [OL] LOCATION: Indianapolis, IN, US DESCRIPTION: Electrical construction		\$25,000,001 - \$50,000,000	Dividends	Over \$5,000,000	Over \$5,000,000
Gaylor Real Estate Carolina, LLC ⇒ Mooresville, NC Commerical Property [RP] LOCATION: Mooresville, NC, US		\$1 - \$1,000	None		
Gaylor Real Estate Fishers, LLC ⇒ Fishers, IN Commercial Property [RP] LOCATION: Fishers, IN, US		\$1 - \$1,000	None		
Gaylor Real Estate Lebanon, LLC ⇒		\$1 - \$1,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Lebanon, IN Commerical Property [RP] LOCATION: Lebanon, IN, US					
Gaylor Real Estate, LLC ⇒ Noblesville, IN Commercial Property [RP] LOCATION: Noblesville, IN, US		\$250,001 - \$500,000	Dividends, Rent	None	\$15,001 - \$50,000
goLock, Inc. [OL] LOCATION: Austin, TX, US DESCRIPTION: Technology enabled locking systems		\$100,001 - \$250,000	None		
Indiana Deferred Compensation Matching Plan (401(a) Plan) ⇒ State Street Target Retirement 2035 Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Indiana Public Employees Deferred Compensation Plan (457(b) Plan) ⇒ State Street Target Retirement 2035 Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Perpetual Inds Inc (PRPI) [ST]		\$100,001 - \$250,000	None		
PureSource Beverage Company, Inc. [OL] LOCATION: Irvine, CA, US DESCRIPTION: Functional beverage industry		\$50,001 - \$100,000	None		
Syscend, Inc. d/b/a Guardian Bikes [OL] LOCATION: Austin, TX, US DESCRIPTION: Children safe bicylces		\$100,001 - \$250,000	None		
UBS 529 Account #1 ⇒ College Choice 529 - 2022 Enrollment A [5P] LOCATION: IN		\$15,001 - \$50,000	Tax-Deferred		
UBS 529 Account #1 ⇒ College Choice 529 - 2022 Enrollment C [5P] LOCATION: IN		\$1,001 - \$15,000	Tax-Deferred		
UBS 529 Account #2 ⇒ College Choice 529 - 2022 Enrollment A [5P] LOCATION: IN		\$15,001 - \$50,000	Tax-Deferred		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
UBS 529 Account #2 ⇒ College Choice 529 - 2022 Enrollment C [5P]  LOCATION: IN		\$1,001 - \$15,000	Tax-Deferred		
UBS 529 Account #2 ⇒ College Choice 529 - 2022 Enrollment I [5P]  LOCATION: IN		\$1,001 - \$15,000	Tax-Deferred		
UBS Brokerage Account #1 ⇒ Money Market Account [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #1 ⇒ UBS Select Prime Institutional Fund (SELXX) [MF]	JT	\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	\$50,001 - \$100,000
UBS Brokerage Account #2 ⇒ Advaxis, Inc. (ADX) [ST]	JT	\$1 - \$1,000	Dividends	None	None
UBS Brokerage Account #2 ⇒ Apple Inc. (AAPL) [ST]	JT	\$250,001 - \$500,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
UBS Brokerage Account #2 ⇒ BlackRock National Municipal Fund Institutional Shares [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Cambiar Opportunity Fund Class Institutional (CAMWX) [MF]	JT	\$50,001 - \$100,000	Dividends	None	None
UBS Brokerage Account #2 ⇒ Carillon Eagle Small Cap Growth Fund Class I (HSIIX) [MF]	JT	\$15,001 - \$50,000	Dividends	None	None
UBS Brokerage Account #2 ⇒ CVS Health Corporation (CVS) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ DWS Intermediate Tax-Free Fund - Class S (SCMTX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #2 ⇒ Federated Hermes Strategic Value Dividend Fund Institutional Shares (SVAIX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
UBS Brokerage Account #2 ⇒ Guggenheim SMid Cap Value Fund Institutional Class	JT	\$15,001 - \$50,000	Dividends	None	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(SVUIX) [MF]					
UBS Brokerage Account #2 ⇒ iShares Russell 1000 Growth ETF (IWF) [ST]	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ iShares Russell 1000 Value ETF (IWD) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Lord Abbett Intermediate Tax-Free Fund (LAIIX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ MFS Research International Fund Class I (MRSIX) [MF]	JT	\$15,001 - \$50,000	Dividends	None	None
UBS Brokerage Account #2 ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Money Market Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #2 ⇒ PGIM Jennison Value Fund- Class Z (PEIZX) [MF]	JT	\$15,001 - \$50,000	Dividends	None	None
UBS Brokerage Account #2 ⇒ PureCycle Technologies, Inc. - Common stock (PCT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Sysco Corporation (SYY) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
UBS Brokerage Account #2 ⇒ T. Rowe Price Summit Municipal Intermediate Fund Investor Class (PRSMX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ TCW Select Equities Fund Class I (TGCEX) [MF]	JT	\$50,001 - \$100,000	Dividends	None	None
UBS Brokerage Account #2 ⇒ Vanguard Growth ETF (VUG) [ST]	JT	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS Brokerage Account #2 ⇒ Vanguard Value ETF (VTV) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
UBS Brokerage Account #2 ⇒ Walmart Inc. (WMT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #2 ⇒ Western Asset Municipal High Income Fund Class I (LMHIX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #3 ⇒ Money Market Account [BA]		\$1 - \$1,000	Interest	None	None
UBS Brokerage Account #3 ⇒ UBS Select Prime Institutional Fund (SELXX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ Invesco Russell 1000 Equal Weight ETF (EQAL) [ST]		\$1,001 - \$15,000	Dividends	None	None
UBS Brokerage Account #4 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ iShares U.S. Treasury Bond ETF (GOVT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #4 ⇒ Money Market Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #4 ⇒ Schwab U.S. Broad Market ETF (SCHB) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS Brokerage Account #4 ⇒ SPDR Nuveen Bloomberg Municipal Bond ETF (TFI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #5 ⇒ Credit Suisse AG MLN SPX [BA]	JT	\$100,001 - \$250,000	None		
UBS Brokerage Account #5 ⇒ Goldman Sachs Bank USA MLCD SPX [BA]	JT	\$100,001 - \$250,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS Brokerage Account #5 ⇒ Money Market Account [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	None
UBS Brokerage Account #5 ⇒ Morgan Stanley Finance MLN Commodity Basket [BA]	JT	\$100,001 - \$250,000	None		
UBS Brokerage Account #5 ⇒ Wells Fargo Finance T-Gears SPX [BA]	JT	\$250,001 - \$500,000	None		
UBS Brokerage Account #6 ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #6 ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #6 ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #6 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
UBS Brokerage Account #6 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #6 ⇒ iShares Core S&P Small-Cap ETF (IJR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #6 ⇒ iShares National Muni Bond ETF (MUB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #6 ⇒ Money Market Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #6 ⇒ Vanguard Mid-Cap ETF (VO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #6 ⇒ Vanguard Russell 1000 Growth ETF (VONG) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #6 ⇒ Vanguard Russell 1000 Value ETF (VONV) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS Brokerage Account #6 ⇒ Vanguard Russell 2000 ETF (VTWO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #7 ⇒ Money Market Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #8 ⇒ Invesco Emerging Markets Sovereign Debt ETF (PCY) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #8 ⇒ Invesco Russell 1000 Equal Weight ETF (EQAL) [ST]		\$1,001 - \$15,000	Dividends	None	None
UBS Brokerage Account #8 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #8 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #8 ⇒ iShares U.S. Treasury Bond ETF (GOVT) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #8 ⇒ Money Market Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
UBS Brokerage Account #8 ⇒ Schwab U.S. Broad Market ETF (SCHB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS Brokerage Account #8 ⇒ SPDR Nuveen Bloomberg Municipal Bond ETF (TFI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS IRA #1 ⇒ PACE Global Real Estate Securities Investments Class P (PREQX) [MF]		\$1 - \$1,000	Tax-Deferred		
UBS IRA #1 ⇒ PACE International Emerging Markets Equity Investments Class P [MF]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #1 ⇒ PACE International Equity Investments Class P (PCIEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		



Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS IRA #1 ⇒ PACE Large Co Growth Equity Investments Class P (PCLCX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #1 ⇒ PACE Large Co Value Equity Investments Class P (PCLVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #1 ⇒ PACE Small/Medium Co Growth Equity Investments Class P [MF]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #1 ⇒ PACE Small/Medium Co Value Equity Investments Class P (PCSVX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #2 ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #2 ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #2 ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #2 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]		\$15,001 - \$50,000	Tax-Deferred		
UBS IRA #2 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #2 ⇒ iShares Core S&P Small-Cap ETF (IJR) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #2 ⇒ Money Market Account [BA]		\$1 - \$1,000	Tax-Deferred		
UBS IRA #2 ⇒ Vanguard Growth ETF (VUG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #2 ⇒ Vanguard Mid-Cap ETF (VO) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS IRA #2 ⇒ Vanguard Russell 1000 Growth ETF (VONG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #2 ⇒ Vanguard Russell 1000 Value ETF (VONV) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #2 ⇒ Vanguard Russell 2000 ETF (VTWO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #2 ⇒ Vanguard Value ETF (VTV) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #3 ⇒ PACE Global Real Estate Securities Investments Class P (PREQX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		
UBS IRA #3 ⇒ PACE International Emerging Markets Equity Investments (PRCEMX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #3 ⇒ PACE International Equity Investments Class P (PCIEX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #3 ⇒ PACE Large Co Growth Equity Investments Class P (PCLCX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #3 ⇒ PACE Large Co Value Equity Investments Class P (PCLVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #3 ⇒ PACE Small/Medium Co Growth Equity Investments Class P (PCSGX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #3 ⇒ PACE Small/Medium Co Value Equity Investments Class P (PCSVX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares 20+ Year Treasury Bond ETF (TLT) [ST]					
UBS IRA #4 ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒ iShares Core S&P Small-Cap ETF (IJR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒ Money Market Account [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒ Vanguard Growth ETF (VUG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒ Vanguard Mid-Cap ETF (VO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒ Vanguard Russell 1000 Growth ETF (VONG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒ Vanguard Russell 1000 Value ETF (VONV) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒ Vanguard Russell 2000 ETF (VTWO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #4 ⇒ Vanguard Value ETF (VTV) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #5 ⇒ Invesco Russell 1000 Equal Weight ETF (EQAL) [ST]		\$1 - \$1,000	Tax-Deferred		
UBS IRA #5 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #5 ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares Core MSCI Emerging Markets ETF (IEMG) [ST]					
UBS IRA #5 ⇒ Money Market Account [BA]		\$1 - \$1,000	Tax-Deferred		
UBS IRA #5 ⇒ Schwab U.S. Broad Market ETF (SCHB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #5 ⇒ Vanguard Total Stock Market ETF (VTI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #6 ⇒ Invesco Russell 1000 Equal Weight ETF (EQAL) [ST]		\$1 - \$1,000	Tax-Deferred		
UBS IRA #6 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS IRA #6 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$1 - \$1,000	Tax-Deferred		
UBS IRA #6 ⇒ Money Market Account [BA]		\$1 - \$1,000	Tax-Deferred		
UBS IRA #6 ⇒ Schwab U.S. Broad Market ETF (SCHB) [ST]		\$1,001 - \$15,000	Tax-Deferred		
UBS UTMA Account #1 ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #1 ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #1 ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS UTMA Account #1 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
UBS UTMA Account #1 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS UTMA Account #1 ⇒ iShares Core S&P Small-Cap ETF (IJR) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #1 ⇒ iShares MSCI EAFE ETF (EFA) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #1 ⇒ Money Market Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
UBS UTMA Account #1 ⇒ Vanguard Growth ETF (VUG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #1 ⇒ Vanguard Mid-Cap ETF (VO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #1 ⇒ Vanguard Russell 1000 Growth ETF (VONG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #1 ⇒ Vanguard Russell 1000 Value ETF (VONV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #1 ⇒ Vanguard Russell 2000 ETF (VTWO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #1 ⇒ Vanguard Value ETF (VTV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS UTMA Account #2 ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS UTMA Account #2 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS UTMA Account #2 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
UBS UTMA Account #2 ⇒ iShares MSCI EAFE ETF (EFA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #2 ⇒ Money Market Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
UBS UTMA Account #2 ⇒ Schwab U.S. Broad Market ETF (SCHB) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS UTMA Account #2 ⇒ Schwab U.S. Large-Cap Value ETF (SCHV) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
UBS UTMA Account #2 ⇒ SPDR Portfolio Long Term Treasury ETF (SPTL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
UBS UTMA Account #3 ⇒ Invesco Russell 1000 Equal Weight ETF (EQAL) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #3 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #3 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
UBS UTMA Account #3 ⇒ Money Market Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
UBS UTMA Account #3 ⇒ Schwab U.S. Broad Market ETF (SCHB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
WishBone Medical, Inc. [OL]  LOCATION: Warsaw, IN, US DESCRIPTION: Children orthopedic implants		\$100,001 - \$250,000	None		

\* 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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Gaylor Electric, Inc.	Salary	\$3,660,589.89	\$1,776,190.61
State of Indiana (General Assembly)	Salary	\$57,744.82	\$69,049.40

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
President & CEO	Gaylor Electric, Inc.
Indiana State Representative	Indiana General Assembly
Board Member	BSA Crossroads of America Council
Board Member	Riverview Health Foundation
Chairman	Davids Well Incorporated

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2018	Charles Goodrich and State of Indiana	Continuing participation in the State of Indiana Deferred Compensation Plan - 457(b) and 401(a) Plans

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>◦ Edward Jones Brokerage Account #1 (Owner: JT) LOCATION: US</li><li>◦ Edward Jones IRA #1</li><li>◦ Gaylor Electric 401(k)</li><li>◦ Gaylor Real Estate Carolina, LLC LOCATION: US</li><li>◦ Gaylor Real Estate Fishers, LLC LOCATION: US</li><li>◦ Gaylor Real Estate Lebanon, LLC LOCATION: US</li><li>◦ Gaylor Real Estate, LLC LOCATION: US</li><li>◦ Indiana Deferred Compensation Matching Plan (401(a) Plan)</li><li>◦ Indiana Public Employees Deferred Compensation Plan (457(b) Plan)</li><li>◦ UBS 529 Account #1 LOCATION: IN</li><li>◦ UBS 529 Account #2 LOCATION: IN</li></ul>
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- UBS Brokerage Account #1 (Owner: JT)  
LOCATION: US
- UBS Brokerage Account #2 (Owner: JT)  
LOCATION: US
- UBS Brokerage Account #3  
LOCATION: US
- UBS Brokerage Account #4  
LOCATION: US
- UBS Brokerage Account #5 (Owner: JT)  
LOCATION: US
- UBS Brokerage Account #6  
LOCATION: US
- UBS Brokerage Account #7  
LOCATION: US
- UBS Brokerage Account #8  
LOCATION: US
- UBS IRA #1
- UBS IRA #2
- UBS IRA #3 (Owner: SP)
- UBS IRA #4 (Owner: SP)
- UBS IRA #5
- UBS IRA #6
- UBS UTMA Account #1  
LOCATION: US
- UBS UTMA Account #2  
LOCATION: US
- UBS UTMA Account #3  
LOCATION: US

## 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

## COMMENTS

## 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:** Charles Goodrich , 08/13/2023