



Filing ID #10066268

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Michael R. Turner  
**Status:** Member  
**State/District:** OH10

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 05/11/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ohio State PERS [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ BlackRock Liquidity Funds FedFund - Premier (BUPXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Fidelity MSCI Utilities Index ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ First Trust Cloud Computing ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Global X Funds Global X U.S. Infrastructure Development ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Invesco KBW Bank ETF (KBWB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares 20+ Year Treasury Bond ETF [EF]					<input type="checkbox"/>
IRA 9527 ⇒ iShares Biotechnology ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares MBS ETF (MBB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares MSCI Emerging Markets Min Vol Factor ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares TIPS Bond ETF (TIP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares U.S. Home Construction ETF (ITB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares U.S. Infrastructure ETF (IFRA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Consumer Discretionary [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Energy Select Sector [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA 9527 ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ VanEck Semiconductor ETF (SMH) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Consumer Staples ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Industrials ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF] DESCRIPTION: Tax deferred acct		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Materials ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Short-Term Corporate Bond ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
ML Brokerage Account 3813 ⇒ Preferred Deposit Money Market Cusip 99861VDMo [MF]		\$15,001 - \$50,000	Interest	\$2,501 - \$5,000	<input checked="" 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?
IRA 9527 ⇒ BlackRock Liquidity Funds FedFund - Premier (BUPXX) [MF]		02/14/2024	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		02/14/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		02/14/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Small-Cap ETF (VB) [EF]		02/14/2024	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]		02/14/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF]		02/14/2024	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares MBS ETF (MBB) [EF]		02/14/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [EF]		09/10/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares U.S. Home Construction ETF (ITB) [EF]		02/14/2024	P	\$1,001 - \$15,000	
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		02/14/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		02/14/2024	P	\$1,001 - \$15,000	
IRA 9527 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		09/10/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [EF]		10/10/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA 9527 ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]		09/10/2024	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares MSCI Emerging Markets Min Vol Factor ETF (EEMV) [EF]		09/10/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF]		09/10/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		09/10/2024	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		09/10/2024	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares U.S. Infrastructure ETF (IFRA) [EF]		10/10/2024	P	\$1,001 - \$15,000	
IRA 9527 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		10/10/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ VanEck Semiconductor ETF (SMH) [EF]		09/10/2024	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [EF]		10/10/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]		10/10/2024	P	\$1,001 - \$15,000	
ML Brokerage Account 3813 ⇒ Preferred Deposit Money Market Cusip 99861VDMo [BA]		11/19/2024	S (partial)	\$15,001 - \$50,000	<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 C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America Home Loans	June 2020	DC Residence Mortgage	\$250,001 - \$500,000
	Congressional Federal Credit Union	April 2024	Personal Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 1994	Myself & the State of Ohio	Continued Participation in the Legislative Pension Plan

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?
Association of Marshall Scholars	01/12/2024	01/16/2024	Washington DC - Oxford UK - London UK - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>IRA 9527</li><li>ML Brokerage Account 3813 (100% Interest) LOCATION: US DESCRIPTION: Money Market</li></ul>
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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. Michael R. Turner , 05/11/2025