



Filing ID #10013481

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Patrick J. Tiberi
Status: Member
State/District: OH12

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2015
Filing Date: 08/19/2016

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
470 & 472 Radcliff Drive	JT	\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Westerville//Delaware, OH, US					
Amcap Fund	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Coverdell Education Savings Account - Capital Income Builder	JT	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Coverdell Education Savings Account - Capital Income Builder	JT	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Coverdell Education Savings Account - Capital Income Builder	JT	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Coverdell Education Savings Account- American Balanced fund	JT	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Coverdell Education Savings Account- American Balanced fund	JT	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Coverdell Education Savings Account- American Balanced fund	JT	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Fifth Third Bank Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Fifth Third Bank Account	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Income Fund American Funds	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Investment Co American Funds (IRA)		\$50,001 - \$100,000	Tax-Deferred	None	<input type="checkbox"/>
New Economy Fund American Funds (IRA)	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
New Economy Fund American Funds (IRA)	SP	\$100,001 - \$250,000	Tax-Deferred	None	<input type="checkbox"/>
Northwestern Mutual Life Insurance (whole)	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
Northwestern Mutual Life Insurance (Whole)		\$100,001 - \$250,000	None		<input type="checkbox"/>
Ohio Deferred Comp Retirement Fund - Fidelity Contrafund		\$50,001 - \$100,000	Tax-Deferred	None	<input type="checkbox"/>
Ohio Deferred Comp Retirement Fund - Fidelity Growth Company		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Ohio Deferred Comp Retirement Fund - Vanguard Institutional Index		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Ohio Deferred Comp Retirement Fund -Vanguard Capital Opportunity		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ohio Deferred Comp Retirement Fund -Vanguard Total Bond Market Index	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Ohio Tuition Trust - College Advantage 529 Advantage Aged Based Option	JT	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: OH					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ohio Tuition Trust - College Advantage 529 Advantage Blackrock Aggressive 10-12 Aged Based Option	JT	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: OH					
Ohio Tuition Trust - College Advantage 529 Advantage Blackrock Moderat 10-12 Aged Based Option	JT	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
LOCATION: OH					
Ohio Tuition Trust - Vanguard 529 Aggressive Age Based Portfolio	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: OH					
Ohio Tuition Trust - Vanguard 529 Aggressive Age Based Portfolio	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: OH					
Ohio Tuition Trust - Vanguard 529 Aggressive Age Based Portfolio	JT	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
LOCATION: OH					
Ohio Tuition Trust - Vanguard 529 Extended Market Index Option	JT	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
LOCATION: OH					
Ohio Tuition Trust - Vanguard 529 Extended Market Index Option	JT	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
LOCATION: OH					
Ohio Tuition Trust - Vanguard 529 Extended Market Index Option	JT	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
LOCATION: OH					
Ohio Tuition Trust - Vanguard 529 Income Portfolio	JT	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
LOCATION: OH					
Ohio Tuition Trust - Vanguard 529 Income Portfolio	JT	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
LOCATION: OH					
Ohio Tuition Trust - Vanguard 529 Income Portfolio	JT	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
LOCATION: OH					
Ohio Tuition Trust - Vanguard 529 Moderate Growth Index	JT	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
LOCATION: OH					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ohio Tuition Trust - Vanguard 529 Moderate Growth Index LOCATION: OH	JT	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Ohio Tuition Trust - Vanguard 529 Moderate Growth Index LOCATION: OH	JT	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
P.E.R.S. Ohio Retirement (Defined Benefit)		\$50,001 - \$100,000	Tax-Deferred	None	<input type="checkbox"/>
Spouse Ohio Deferred Comp Retirement Fund - Fidelity Contrafund	SP	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>
Spouse Ohio Deferred Comp Retirement Fund -- Vanguard small cap index	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Spouse Ohio Deferred Comp Retirement Fund _ Dodge & Cox Stock	SP	\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Washington Mutual Coverdell Education IRA	JT	\$15,001 - \$50,000	Tax-Deferred	None	<input type="checkbox"/>

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Firth Third Bank Account	JT	06/1/2015	P	\$1,001 - \$15,000	
Ohio Deferred Comp Retirement Fund -Pimco total Return		03/19/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Ohio Deferred Comp Retirement Fund -Vanguard Capital Opportunity		03/19/2015	P	\$1,001 - \$15,000	
Ohio Deferred Comp Retirement Fund -Vanguard Total Bond Market Index	SP	08/19/2015	P	\$1,001 - \$15,000	
Ohio Tuition Trust - Vanguard 529 Aggressive Age Based Portfolio LOCATION: OH	JT	01/18/2015	P	\$1,001 - \$15,000	
Ohio Tuition Trust - Vanguard 529 Aggressive Age Based	JT	01/18/2015	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Portfolio					
LOCATION: OH					
Ohio Tuition Trust - Vanguard 529 Aggressive Age Based Portfolio	JT	01/18/2015	P	\$1,001 - \$15,000	
LOCATION: OH					
Spouse Ohio Deferred Comp Retirement Fund -- FPA Capital	SP	05/13/2015	S	\$1,001 - \$15,000	<input type="checkbox"/>
Spouse Ohio Deferred Comp Retirement Fund -- Vanguard small cap index	SP	05/13/2015	P	\$1,001 - \$15,000	

SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Fifth Third Bank	Feb 2009	Mortgage on personal Residence Genoa Township (not rented)	\$250,001 - \$500,000
JT	Fifth Third Bank	August 2015	Mortgage on personal residence Alexandria, VA (not rented)	\$50,001 - \$100,000
JT	Fifth Third Bank	December 2011	Mortgage on rental property 470/472 Radcliff Drive	\$50,001 - \$100,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	Hinson Family Trust (Uncompensated)
Member	National Endowment for the Arts (uncompensated)

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2000	State of Ohio	Continued Participation in Ohio PERS

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.

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. Patrick J. Tiberi , 08/19/2016