



Filing ID #10017372

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2016  
**Filing Date:** 05/25/2017

## 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	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					
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	\$15,001 - \$50,000	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

None disclosed.

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

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Ripon Society and Franklin Center	11/9/2016	11/14/2016	Columbus, Ohio - London - Dulles, VA	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 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 , 05/25/2017