



Filing ID #10011959

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Joyce Beatty  
**Status:** Member  
**State/District:** OH03

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2015  
**Filing Date:** 05/17/2016

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
493 Parkwood Avenue <small>LOCATION: Columbus/Franklin, OH, US DESCRIPTION: Vacant land</small>		\$15,001 - \$50,000	None		<input type="checkbox"/>
5628 Naiche Road <small>LOCATION: Columbus/Franklin, OH, US DESCRIPTION: Sold property in 2015</small>		None	Capital Gains	\$100,001 - \$1,000,000	<input checked="" type="checkbox"/>
803 Wager Street <small>LOCATION: Columbus/Franklin, OH, US DESCRIPTION: Vacant land</small>		\$15,001 - \$50,000	None		<input type="checkbox"/>
American Express Company (AXP)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Cardinal Health, Inc. (CAH)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
CareFusion Corporation (CFN)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Columbus Municipal Credit Union		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Congressional Federal Credit Union		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Corinthian Baptist Church Credit Union		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Facebook, Inc. - Class A (FB)		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Federal Home Loan Mortgage Corporation (FMCC)		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Fifth Third Bank		\$250,001 - \$500,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fifth Third Saving Accounts		\$1,000,001 - \$5,000,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Huntington Bancshares Incorporated (HBAN)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
IRA cash		\$50,001 - \$100,000	None		<input type="checkbox"/>
iShares MSCI Singapore Index Fund (EWS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Joyce & Otto Beatty Scholarship Fund		\$15,001 - \$50,000	None		<input type="checkbox"/>
Joyce Beatty & Associates, Inc.		\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: Columbus, OH, US DESCRIPTION: This is my asset value in my company					
JP Morgan Chase		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
JP Morgan Chase & Co. (JPM)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Key Bank Account		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Microsoft Corporation (MSFT)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Nuveen NASDAQ 100 Dynamic Overwrite Fund - Shares of Beneficial Interest (QQQX)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Nuveen Preferred Securities Income Fund 2 Shares of Beneficial Interest (JPS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Ohio Credit Union		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
PNC(Pittsburgh National Corp) Bank		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Source Capital, Inc. (SOR)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Southern Company (SO)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Touchstone Flexible Income Fund		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
US Saving Bonds		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: This is my EE US Savings Bonds					

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
5628 Naiche Road		12/1/2015	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
LOCATION: Columbus/Franklin, OH, US					
DESCRIPTION: This property was sold					

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Ohio Public Employees Retirement System	Retirement income for self	\$253,323.12
Otto Beatty Law Offices	Spouse's Employment	N/A
State of Ohio Public Employees Retirement	Spouse	N/A
Beatty Real Estate	Spouse	N/A
Key Bank	Spouse Stipend for meetings	N/A

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	American Heart Association, Inc. Non profit
Board Member	Fire & Focus, Inc. Non Profit
National Social Actions Committee Member	Delta Sigma Theta Sorority
Executive Committee Member-	The Links, Inc. Columbus Chapter
Owner	Joyce Beatty & Association, Inc.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2011	Myself and OPERS	My on-going public retirement for 33 years of working service.

## 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. Joyce Beatty , 05/17/2016