



Filing ID #10015762

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: 2016
Filing Date: 05/15/2017

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
493 Parkwood <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	\$1,001 - \$2,500	<input type="checkbox"/>
CareFusion Corporation (CFN)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Columbus Municipal Credit Union		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Congressional Federal Credit Union		\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
Corinthian Baptist Church Credit Union		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Facebook, Inc. - Class A (FB)		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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 Savings Account		\$1,000,001 - \$5,000,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Huntington Bancshares Incorporated (HBAN)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares MSCI Singapore Capped ETF (EWS)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Joyce & Otto Beatty Scholarship Fund		\$15,001 - \$50,000	None		<input type="checkbox"/>
Joyce Beatty & Associates		\$100,001 - \$250,000	None		<input type="checkbox"/>
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	\$1,001 - \$2,500	<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"/>
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	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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"/>

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
803 Wager Street LOCATION: Columbus/Franklin, OH, US DESCRIPTION: The exchange was a Donation of the property to Nationwide Children's Hospital		12/22/2016	E	\$1,001 - \$15,000	

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Ohio Public Employees Retirement System	Retirement income for self	\$253,323.12
Otto Beatty Law Office	Spouse's Employment	N/A
Beatty Real Estate	Spouse	N/A
State of Ohio Public Retirement Employees Retirement	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	American Heart Association
Board member	Fire and Focus, Inc. Non Profit

Position	Name of Organization
National Soical Actions Committee Board Member	Delta Sigma Theta Sorority, Inc.
Executive Committee Board Memaber	The Links, Inc., Columbus Chapter
Owner	Joyce Beatty & Associates, Inc.
Board Member	Congressional Black Caucus Foundation

SCHEDULE F: AGREEMENTS

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

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?
Trumpet Awards Foundation	01/22/2016	01/24/2016	District: Columbus, Ohio - Atlanta, GA - Columbus Ohio	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. Joyce Beatty , 05/15/2017