



Filing ID #10010793

# 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:** 2015  
**Filing Date:** 05/16/2016

## 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               | 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    | \$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

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

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 , 05/16/2016