



Filing ID #10008697

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2014
Filing Date: 10/9/2015

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
229-241 S. High Street		None	Capital Gains	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
LOCATION: Columbus/Franklin, OH, US DESCRIPTION: amend to 229-241					
229-243 S. High Street		None	Capital Gains	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
LOCATION: Columbus/Franklin, OH, US					
493 Parkwood Avenue		\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: Columbus/Franklin, OH, US					
5628 Naiche Road		\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Columbus/Franklin, OH, US					
803 Wager Street		\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: Columbus/Franklin, OH, US					
American Express Company (AXP)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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"/>
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"/>
CareFusion Corporation (CFN)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Columbus Municipal Credit Union		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Columbus Municipal Credit Union		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Corinthian Baptist Church 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"/>
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"/>
Federal Home Loan Mortgage Corporation (FMCC)		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
Fifth Third Bank		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Fifth Third Bank		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Fifth Third Saving Accounts		\$1,000,001 - \$5,000,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Fifth Third Saving Accounts		\$1,000,001 - \$5,000,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Huntington Bancshares Incorporated (HBAN)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Huntington Bancshares Incorporated (HBAN)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
IRA cash		\$50,001 - \$100,000	None		<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"/>
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	Interest	None	<input type="checkbox"/>
Joyce & Otto Beatty Scholarship Fund		\$15,001 - \$50,000	Interest	None	<input type="checkbox"/>
Joyce Beatty & Assoc. DPA Pieces		\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: This is my asset value in store					
Joyce Beatty & Assoc. DPA Pieces		\$100,001 - \$250,000	None		<input type="checkbox"/>
DESCRIPTION: This is my asset value in store					
JP Morgan Chase		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
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"/>
JP Morgan Chase & Co. (JPM)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Key Bank Account		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Key Bank Account		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Microsoft Corporation (MSFT)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Microsoft Corporation (MSFT)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
NASDAQ Premium Income and Growth Fund Inc. (QQQX)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
NASDAQ Premium Income and Growth Fund Inc. (QQQX)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Nuveen Quality Preferred Income Fund 2 Shares of Beneficial Interest (JPS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Nuveen Quality Preferred 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"/>
Ohio Credit Union		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Ohio Credit Union		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Ohio Credit Union		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
PNC (Pittsburgh National Corp) Bank Account		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Amended to read PNC (Pittsburgh National Corp) Bank Account					
PNC (Pittsburgh National Corporation) Bank Account		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Source Capital, Inc. (SOR)		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<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"/>
Southern Company (SO)		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Touchstone Flexible Income Fund		\$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 Saving Bonds					
US Saving Bonds		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: This is my EE US Saving Bonds					

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
229-243 S. High Street		02/28/2014	S	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
LOCATION: Columbus/Franklin, OH, US					
5628 Naiche Road		09/30/2014	P	\$250,001 - \$500,000	
LOCATION: Columbus/Franklin, OH, US					

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Joyce Beatty & Associates, Inc.	Employment	\$7,000
Ohio Public Employees Retirement System	Retirement for self	\$253,323.12
Otto Beatty Law Offices	Spouse's Employment	N/A
State of Ohio Public Employees Retirement	Spouse retirement	N/A
Beatty Real Estate	Spouse's Employment	N/A
Key Bank	Spouse Stipend meetings	\$1,500

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	American Heart Association, Inc. (non-profit)
Executive Bd. Member	Fire & Focus, Inc. (non-profit)
Executive Board Member, Women Empowerment Co-Chair	The Links, Inc. (non profit)
Owner	Joyce Beatty & Associates, DBA Pieces

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2011	Myself and OPERS	My on-going public retirement agreement 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?
The Links, Inc. National Board Member Travel	07/1/2014	07/3/2014	Columbus, Ohio - National Harbor, Maryland - Columbus	1	<input type="checkbox"/>	<input 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 , 10/9/2015