



Filing ID #10024343

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. David Schweikert
Status: Member
State/District: AZ06

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2017
Filing Date: 08/13/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
457(B) PLAN ⇒ BARON GR INST [MF]		\$15,001 - \$50,000	Tax-Deferred	<input checked="" type="checkbox"/>
457(B) PLAN ⇒ LOOMIS VAL N [MF]		\$15,001 - \$50,000	Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: PREVIOUSLY LISTED AS 457 PLAN DEFERRED COMP MARICOPA COUNTY				
529 ⇒ AZ PORTFOLIO 2033 (FIDELITY INDEX) [MF]		\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: PREVIOUSLY LISTED AS AZ 529 FIDELITY				
BUSINESS HOLDINGS ⇒ SHERIDAN EQUITIES HOLDINGS LLC [OL]		\$1,000,001 - \$5,000,000	None	<input type="checkbox"/>
LOCATION: FOUNTAIN HILLS, AZ, US DESCRIPTION: REAL ESTATE BUSINESS				
BUSINESS HOLDINGS ⇒ SHERIDAN EQUITIES LLC [OL]		\$1,001 - \$15,000	None	<input type="checkbox"/>
LOCATION: FOUNTAIN HILLS, AZ, US DESCRIPTION: REAL ESTATE BUSINESS				
INSURANCE ⇒ SFT IVY GROWTH [MF]	SP	\$15,001 - \$50,000	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS				
INSURANCE ⇒ SFTADV IDX 500 C2 [MF]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS PREVIOUSLY LISTED AS ADVANTUS IND 500				
INSURANCE ⇒ SFTADV MTG SEC C2 [MF]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS				
INSURANCE ⇒ STADV BOND C2 [MF]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS				
SESC - 401(K) ⇒ BlackRock Advantage Large Cap Val Inv A (MDLVX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: PREVIOUSLY LISTED AS BLKRK LG C P				
SESC - 401(K) ⇒ BlackRock Global Allocation Inv A (MDLOX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred	<input checked="" type="checkbox"/>
SESC - 401(K) ⇒ BlackRock International Inv A (MDILX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: PREVIOUSLY LASTED AS BLKRK INTL				
SESC - 401(K) ⇒ BlackRock Small Cap Growth II Inv A (MDSWX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred	<input checked="" type="checkbox"/>
SESC - 401(K) ⇒ BlackRock US Government Bond Inv A (CIGAX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred	<input type="checkbox"/>

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
457(B) PLAN ⇒ BARON GR INST [MF]		11/28/2017	P	\$1,001 - \$15,000	
DESCRIPTION: REINVESTED CAPITAL GAIN					
457(B) PLAN ⇒ LOOMIS VAL N [MF]		12/13/2017	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: REINVESTED CAPITAL GAIN					
SESC - 401(K) ⇒ BlackRock Global Allocation Inv A (MDLOX) [MF]	SP	12/19/2017	P	\$1,001 - \$15,000	
DESCRIPTION: REINVEST DIVIDENDS					
SESC - 401(K) ⇒ BlackRock Small Cap Growth II Inv A (MDSWX) [MF]	SP	12/4/2017	P	\$1,001 - \$15,000	
DESCRIPTION: REINVEST DIVIDENDS					

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
SCOTTSDALE EYE SURGERY	SPOUSE SALARY	N/A
PUBLIC SAFETY PERSONNEL RETIREMENT SYSTEM	RETIREMENT	\$46,558.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	CANYON STATE CREDIT UNION	JAN 2017	HOME EQUITY LOAN	\$50,001 - \$100,000
	SALLIE MAE/NAVIENT	JAN 2004	STUDENT LOANS	\$15,001 - \$50,000
SP	AADVANTAGE MASERCARD	12/31/2017	REVOLVING CHARGE ACCOUNT	\$10,000 - \$15,000
	CANYON STATE CU MASTERCARD	12/31/2017	REVOLVING CHARGE ACCOUNT	\$10,000 - \$15,000
	COSTCO CITIBANK VISA	12/31/2017	REVOLVING CHARGE ACCOUNT	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
MANAGING MEMBER	SHERIDAN EQUITIES LLC
MANAGING MEMBER	SHERIDAN EQUITIES HOLDINGS LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2010	SHERIDAN EQUITIES HOLDINGS	SHERIDAN EQUITIES HOLDNGS LLC HAS AN AGREEMENT WITH SWARTZ & BROUGH FOR A PORTION OF RESIDENT EQUITY ON THE PARTNERSHIP FORMALLY MANAGED/PARTICIAPTED IN BY SHERIDAN EQUITIES. NOW CONTROLLED BY SWARTZ & BROUGH UPON THE COMPLETION ISSUE.
January 2004	ME AND MARICOPA COUNTY	COUNTY SPONSORED 527 PLAN.

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 CLUB FOR GROWTH	03/17/2017	03/18/2017	WASHINGTON, DC - PALM BEACH, FL - PHOENIX, AZ	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none">◦ 457(B) PLAN◦ 529 LOCATION: AZ◦ BUSINESS HOLDINGS LOCATION: US◦ INSURANCE (Owner: SP)◦ SESC - 401(K) (Owner: SP)

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. David Schweikert , 08/13/2018