



Filing ID #10047969

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Tom O'Halleran  
**Status:** Member  
**State/District:** AZ01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 05/16/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset   | Owner | Value of Asset            | Income Type(s)       | Income              | Tx. > \$1,000?           |
|---|-------|---------------------------|----------------------|---------------------|--------------------------|
| Arizona State Retirement System [DB]  |       | Undetermined              | Pension Distribution | \$2,501 - \$5,000   | <input type="checkbox"/> |
| BMO Harris Bank Account [BA]  | SP    | \$1,001 - \$15,000        | None                 |                     | <input type="checkbox"/> |
| Chase Bank Accounts [BA]  | JT    | \$15,001 - \$50,000       | None                 |                     | <input type="checkbox"/> |
| Chicago Teachers Pension Fund [DB]  | SP    | Undetermined              | Pension Distribution | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Horseshoe Bend, LLC and O'Halleran Commodities, Inc. Profit Sharing Plan and Trust [RP]   |       | \$1,000,001 - \$5,000,000 | None                 |                     | <input type="checkbox"/> |
| LOCATION: Yavapai County, AZ, US<br>DESCRIPTION: The land in Yavapai County, Arizona is owned 100% by Horseshoe Bend LLC (LLC). The Member owns 13.08% of the LLC and the remaining 86.92% of the LLC is owned by O'Halleran Commodities, Inc. Profit Sharing Plan and Trust (Plan). The Plan is owned 100% by the Member. This Plan was created effective as of October 31, 1980 and was originally named the O'Halleran Commodities, Inc. Pension Plan and Trust but changed to O'Halleran Commodities, Inc. Profit Sharing Plan and Trust in 2008. Market Value. |       |                           |                      |                     |                          |
| O'Halleran Family Trust, Primary Personal Residence [RP]  |       | \$1,000,001 - \$5,000,000 | None                 |                     | <input type="checkbox"/> |
| LOCATION: Village of Oak Creek, AZ, US  |       |                           |                      |                     |                          |
| Spouse IRA ⇒  | SP    | \$100,001 -               | Tax-Deferred         |                     | <input type="checkbox"/> |

| Asset                                   | Owner | Value of Asset           | Income Type(s) | Income | Tx. ><br>\$1,000?        |
|---|-------|--------------------------|----------------|--------|--------------------------|
| Apple Inc. (AAPL) [ST]                  |       | \$250,000                |                |        | <input type="checkbox"/> |
| Whole Life Insurance - Mass Mutual [WU] | SP    | \$100,001 -<br>\$250,000 | None           |        | <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

None disclosed.

## SCHEDULE C: EARNED INCOME

| Source                          | Type                     | Amount     |
|---------------------------------|--------------------------|------------|
| Arizona State Retirement System | Pension Payment          | \$4,595.00 |
| Chicago Teachers Pension Fund   | Pension Payment - Spouse | N/A        |

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

| Date         | Parties To   | Terms of Agreement  |
|--------------|--|---|
| January 2001 | Tom O'Halleran and Arizona State Retirement System | Pension plan agreement between Tom O'Halleran and Arizona State Retirement System |

## 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.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Spouse IRA (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. Tom O'Halleran , 05/16/2022