



Filing ID #10053208

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. David Schweikert
Status: Member
State/District: AZ01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2022
Filing Date: 08/12/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|----------------------|----------------|--------|-------------------------------------|
| 457(B) PLAN ⇒ BARON GR INST (BGRIX) [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| 457(B) PLAN ⇒ PTNM R6 (PEQSX) [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| 529 ⇒ AZ PORTFOLIO 2033 (FIDELITY INDEX) [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| BUSINESS HOLDINGS ⇒ SHERIDAN EQUITIES HOLDINGS LLC [OL] LOCATION: Fountain Hills, AZ, US DESCRIPTION: REAL ESTATE BUSINESS | | None | None | | <input type="checkbox"/> |
| BUSINESS HOLDINGS ⇒ SHERIDAN EQUITIES LLC [OL] LOCATION: Fountain Hills, AZ, US DESCRIPTION: REAL ESTATE BUSINESS | | None | None | | <input type="checkbox"/> |
| INSURANCE ⇒ SFT CORE BOND C2 [MF] DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS. | SP | \$1,001 - \$15,000 | None | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|--------------|-----------------------|-----------------------|---------------|-------------------------------------|
| INSURANCE => SFT INDEX 500 C2 [MF] | SP | \$15,001 - \$50,000 | None | | <input type="checkbox"/> |
| DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS. | | | | | |
| INSURANCE => SFT IVY GROWTH [MF] | SP | \$15,001 - \$50,000 | None | | <input type="checkbox"/> |
| DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS. | | | | | |
| IRA => LARGE CAP VALUE FD [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| IRA => VT GROWTH OPP [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| ROTH IRA => Fidelity Trend Fund (FTRNX) [MF] | DC | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| SESC - 401(K) => BlackRock LifePath Index 2030 [MF] | SP | \$250,001 - \$500,000 | Tax-Deferred | | <input checked="" 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 (BGRIX) [MF] | | 12/8/2022 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Reinvestment of Capitals Gains. | | | | | |
| 457(B) PLAN => PTNM R6 (PEQSX) [MF] | | 12/8/2022 | P | \$1,001 - \$15,000 | |
| DESCRIPTION: Reinvestment of Capitals Gains. | | | | | |
| SESC - 401(K) => BlackRock LifePath Index 2030 [MF] | SP | 04/27/2022 | P | \$1,001 - \$15,000 | |
| SESC - 401(K) => BlackRock LifePath Index 2030 [MF] | SP | 02/2/2022 | P | \$1,001 - \$15,000 | |
| SESC - 401(K) => BlackRock LifePath Index 2030 [MF] | SP | 02/16/2022 | P | \$1,001 - \$15,000 | |

* 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 |
|---|---------------|-------------|
| PUBLIC SAFETY PERSONNEL RETIREMENT SYSTEM | Retirement | \$50,580.66 |
| Legere | Spouse Salary | N/A |
| ProMedTek, Inc. | Spouse Salary | N/A |

SCHEDULE D: LIABILITIES

| Owner Creditor | Date Incurred | Type | Amount of Liability |
|--------------------------|---------------|--|-----------------------|
| SALLIE MAE/NAVIENT | JAN 2004 | STUDENT LOANS | \$15,001 - \$50,000 |
| FLAGSTAR BANK | MAY 2020 | RESIDENTIAL MORTGAGE | \$250,001 - \$500,000 |
| COPPERSTATE CREDIT UNION | March 2022 | Home Equity Line of Credit for Campaign Loan | \$100,001 - \$250,000 |

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 |
|--------------|------------------------|----------------------------|
| January 2004 | ME AND MARICOPA COUNTY | COUNTY SPONSORED 527 PLAN. |

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

- 457(B) PLAN
- 529
LOCATION: AZ
- BUSINESS HOLDINGS
LOCATION: US
- INSURANCE (Owner: SP)
- IRA (Owner: SP)
- ROTH IRA (Owner: DC)
- 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 , 08/12/2023