



Filing ID #10037590

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: 2019
Filing Date: 08/11/2020

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 ⇒ BARON GR INST (BGRIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
457(B) PLAN ⇒ PTNM R6 (PEQSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
457(B) PLAN ⇒ PTNM R6 (PEQSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 ⇒ AZ PORTFOLIO 2033 (FIDELITY INDEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input 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]		None	None		<input type="checkbox"/>
LOCATION: FOUNTAIN HILLS, AZ, US DESCRIPTION: REAL ESTATE BUSINESS					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
BUSINESS HOLDINGS ⇒ SHERIDAN EQUITIES HOLDINGS LLC [OL] LOCATION: FOUNTAIN HILLS, AZ, US DESCRIPTION: REAL ESTATE BUSINESS		\$250,001 - \$500,000	None		<input type="checkbox"/>
BUSINESS HOLDINGS ⇒ SHERIDAN EQUITIES LLC [OL] LOCATION: FOUNTAIN HILLS, AZ, US DESCRIPTION: REAL ESTATE BUSINESS		\$1,001 - \$15,000	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"/>
INSURANCE ⇒ SFT CORE BOND C2 [MF] DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS. PREVIOUSLY LISTED AS "STADV BOND C2."	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
INSURANCE ⇒ SFT INDEX 500 C2 [MF] DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS PREVIOUSLY LISTED AS "SFTADV IDX 500 C2"	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
INSURANCE ⇒ SFT INDEX 500 C2 [MF] DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS.	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
INSURANCE ⇒ SFT IVY GROWTH [MF] DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS.	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
INSURANCE ⇒ SFT IVY GROWTH [MF] DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS.	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
IRA ⇒ VT EQUITY INCOME [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ VT EQUITY INCOME [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA ⇒ VT GROWTH OPP [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA ⇒ VT GROWTH OPP [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SESC - 401(K) ⇒ BlackRock LifePath Index 2030 [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
SESC - 401(K) ⇒ BlackRock LifePath Index 2030 [MF]	SP	\$100,001 - \$250,000	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 (BGRIX) [MF] DESCRIPTION: REINVESTED CAPITAL GAIN		11/26/2019	P	\$1,001 - \$15,000	
SESC - 401(K) ⇒ BlackRock LifePath Index 2030 [MF]	SP	11/27/2019	P	\$1,001 - \$15,000	
SESC - 401(K) ⇒ BlackRock LifePath Index 2030 [MF]	SP	04/17/2019	P	\$1,001 - \$15,000	
SESC - 401(K) ⇒ BlackRock LifePath Index 2030 [MF]	SP	05/15/2019	P	\$1,001 - \$15,000	
SESC - 401(K) ⇒ BlackRock LifePath Index 2030 [MF]	SP	05/29/2019	P	\$1,001 - \$15,000	
SESC - 401(K) ⇒ BlackRock LifePath Index 2030 [MF]	SP	07/10/2019	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
SCOTTSDALE EYE SURGERY CENTER	SPOUSE SALARY	N/A
PUBLIC SAFETY PERSONNEL RETIREMENT SYSTEM	RETIREMENT	\$47,663.22

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
	WELLS FARGO BANK	MAR 2013	RESIDENTIAL MORTGAGE	\$250,001 - \$500,000
	CITIBANK - COSTCO CARD	12/31/2019	REVOLVING CHARGE ACCOUNT	\$10,000 - \$15,000
	CANYON STATE CREDIT UNION	JAN 2017	HOME EQUITY LOAN	\$50,001 - \$100,000
	SALLIE MAE/NAVIENT	JAN 2004	STUDENT LOANS	\$15,001 - \$50,000
	CANYON STATE CU MASTERCARD	12/31/2018	REVOLVING CHARGE ACCOUNT	\$10,000 - \$15,000
	CHASE BANK - SH	12/31/2018	REVOLVING CHARGE ACCOUNT	\$15,001 - \$50,000
	WELLS FARGO BANK	MAR 2013	RESIDENTIAL MORTGAGE	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
MANAGING MEMBER	SHERIDAN EQUITIES LLC
MANAGING MEMBER	SHERIDAN EQUITIES HOLDINGS LLC
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 HOLDINGS LLC HAS AN AGREEMENT WITH SWARTZ & BROUGH FOR A PORTION OF RESIDENT EQUITY ON THE PARTNERSHIP FORMALLY MANAGED/PARTICIPATED IN BY SHERIDAN EQUITIES. NOW CONTROLLED BY SWARTZ & BROUGH UPON THE COMPLETION ISSUE. THIS AGREEMENT WAS COMPLETED IN 2019.
January 2004	ME AND MARICOPA COUNTY	COUNTY SPONSORED 527 PLAN.
November 2010	SHERIDAN EQUITIES HOLDINGS	SHERIDAN EQUITIES HOLDINGS LLC HAS AN AGREEMENT WITH SWARTZ & BROUGH FOR A PORTION OF RESIDENT EQUITY ON THE PARTNERSHIP FORMALLY MANAGED/PARTICIPATED 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

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)
- 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 , 08/11/2020