



Filing ID #10055256

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Craig Riedel  
**Status:** Congressional Candidate  
**State/District:** OH09

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2023  
**Filing Date:** 07/10/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Europacific Growth CL F3 [MF]	JT	None	Dividends	None	\$2,501 - \$5,000
American Fundamental Investors CL F3 [MF]	JT	None	Dividends	None	\$1,001 - \$2,500
American International Growth & Income CL F3 [MF]	JT	None	Dividends	None	\$1 - \$200
American International Growth & Income CL F3 [MF]	JT	None	Dividends	None	\$1 - \$200
American International Growth & Income CL F3 [MF]	JT	None	Dividends	None	\$1 - \$200
Apple Inc. (AAPL) [ST]	JT	None	Capital Gains, Dividends, Interest	None	\$15,001 - \$50,000
Bridge Builder Core Plus Bond [MF]	JT	None	Dividends	None	\$201 - \$1,000
Bridge Builder INTL Equity [MF]	JT	None	Dividends	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bridge Builder Large Growth [MF]	JT	None	Capital Gains, Dividends	None	\$1 - \$200
Bridge Builder Large Value [MF]	JT	None	Capital Gains, Dividends	None	\$201 - \$1,000
Craig Roth IRA ⇒ American Amcap CL F3 [MF]		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Craig Roth IRA ⇒ American International Growth & Income CL F3 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth IRA ⇒ Hartford Dividend & Growth CL F [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Craig Roth IRA ⇒ Hartford International Opportunities CL F [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Craig Roth IRA ⇒ Hartford Total Return Bond CL F [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth IRA ⇒ iShares Core S&P Mid Cap ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth IRA ⇒ iShares Core S&P Small Cap ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth IRA ⇒ John Hancock Bond CL R6 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth IRA ⇒ T Rowe Price US Treasury Money CL I [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth Traditional IRA ⇒ American Europacific Growth CL F3 [MF]		\$100,001 - \$250,000	Dividends	None	\$1,001 - \$2,500
Craig Roth Traditional IRA ⇒ American Fundamental Investors CL F3 [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Craig Roth Traditional IRA ⇒ Goldman Sachs Financial Square Government CL I [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Craig Roth Traditional IRA ⇒ iShares Core Dividend Growth ETF [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Craig Roth Traditional IRA ⇒ JP Morgan Emerging Markets Equity CL R6 [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Craig Roth Traditional IRA ⇒ JP Morgan Growth Advantage CL R6 [MF]		\$100,001 - \$250,000	Dividends	None	\$201 - \$1,000
Craig Roth Traditional IRA ⇒ MFS International Diversification CL R6 [MF]		\$100,001 - \$250,000	Dividends	None	\$2,501 - \$5,000
Craig Roth Traditional IRA ⇒ MFS Mid Cap Growth CL R6 [MF]		\$15,001 - \$50,000	None		
Craig Roth Traditional IRA ⇒ Vanguard S&P 500 ETF [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Craig Roth Traditional IRA ⇒ Vanguard Small Cap Growth ETF [EF]		\$50,001 - \$100,000	Dividends	\$1 - \$200	\$201 - \$1,000
Craig Roth Traditional IRA ⇒ Victory Sycamore Established Value CL R6 [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Craig Roth Traditional IRA ⇒ Victory Sycamore Small Company Opportunity CL R6 [MF]		\$50,001 - \$100,000	Dividends	None	\$5,001 - \$15,000
Danette Roth IRA ⇒ American AMCAP CL F3 [MF]	SP	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Danette Roth IRA ⇒ American International Growth & Income CL F3 [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Danette Roth IRA ⇒ Hartford Dividend & Growth CL F [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Danette Roth IRA ⇒ Hartford International Opportunities CL F [MF]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Danette Roth IRA ⇒ Hartford Total Return Bond CL F [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Danette Roth IRA ⇒ iShares Core S&P Mid Cap ETF [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Danette Roth IRA ⇒ iShares Core S&P Small Cap ETF [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Danette Roth IRA ⇒ John Hancock Bond CL R6 [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Danette Roth IRA ⇒ T Rowe Price US Treasury Money CL I [MF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Delaware Emerging Markets CL [MF]	JT	None	Dividends	None	\$1 - \$200
DFA Global Real Estate Securities CL I [MF]	JT	None	Capital Gains, Dividends	None	\$1 - \$200
DFA International Small Company CL I [MF]	JT	None	Dividends	None	\$1 - \$200
DFA US Small Cap Value CL I [MF]	JT	None	Capital Gains, Dividends	None	\$1 - \$200
Goldman Sachs Financial Square Government CL I [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford Dividend & Growth CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford Dividend & Growth CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford International Opportunities CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford International Opportunities CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford Total Return Bond CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford Total Return Bond CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Ishares Core Dividend Growth ETF [EF]	JT	None	Dividends	None	\$2,501 - \$5,000
Ishares Core S&P Mid Cap [EF]	JT	None	Dividends	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ishares Core S&P Mid Cap ETF [EF]	JT	None	Dividends	None	\$1 - \$200
Ishares Core S&P Small Cap ETF [EF]	JT	None	Dividends	None	\$1 - \$200
Ishares Core S&P Small Cap ETF [EF]	JT	None	Dividends	None	\$1 - \$200
ISHARES CORE US AGGREGATE BOND [EF]	JT	None	Interest	None	\$201 - \$1,000
ISHARES MSCI EAFE SMALL CAP [EF]	JT	None	Dividends	None	\$1 - \$200
ISHARES TR S&P SMALLCAP [EF]	JT	None	Dividends	None	\$1 - \$200
ISHARES TRUST CORE MSCI EAFE [EF]	JT	None	Dividends	None	\$201 - \$1,000
Jensen Quality Growth CL Y [MF]	JT	None	Capital Gains, Dividends	None	\$201 - \$1,000
John Hancock Bond CL R6 [MF]	JT	None	Dividends	None	\$1 - \$200
John Hancock Disciplined Value CL R6 [MF]	JT	None	Capital Gains, Dividends	None	\$1 - \$200
JPMorgan emerging Markets Equity CL R6 [MF]	JT	None	Dividends	None	\$201 - \$1,000
MFS International Diversification CL R6 [MF]	JT	None	Dividends	None	\$2,501 - \$5,000
Ohio Public Employees Retirement System Defined Benefit Plan [DB]		\$50,001 - \$100,000	None		
T Rowe Price High Yield Bond CL I [MF]	JT	None	Dividends	None	\$1 - \$200
TWC Emerging Markets Income Plan CL P [MF]	JT	None	Dividends	None	\$1 - \$200
VANGUARD FTSE EMERGING MARKETS [EF]	JT	None	Dividends	None	\$1 - \$200
VANGUARD INDEX TR VANGUARD GROWTH [EF]	JT	None	Capital Gains, Dividends	None	\$201 - \$1,000
VANGUARD INDEX TR VANGUARD VALUE [EF]	JT	None	Capital Gains, Dividends	None	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Mid Cap ETF [EF]	JT	None	Capital Gains, Dividends	None	\$201 - \$1,000
Vanguard S&P 500 ETF [EF]	JT	None	Dividends	None	\$2,501 - \$5,000
Vanguard Small Cap Growth ETF [EF]	JT	None	Dividends	None	\$201 - \$1,000
Vanguard Small Cap Growth ETF [EF]	JT	None	Dividends	None	\$1 - \$200
Vanguard Total BD Market ETF [EF]	JT	None	Dividends	None	\$1 - \$200
Victory Sycamore Established Value CL R6 [MF]	JT	None	Dividends	None	\$1,001 - \$2,500
Victory Sycamore Small Company Opportunity CL R6 [MF]	JT	None	Dividends	None	\$201 - \$1,000

\* 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 Current Year to Filing	Amount Preceding Year
State of Ohio	Salary	N/A	\$75,500.00

### SCHEDULE D: LIABILITIES

None disclosed.

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2017	Craig Riedel and Ohio Public Employees Retirement System	Agreement with Ohio Public Employees Retirement System during period of 2017 to 2022 for service credits toward retirement or permanent disability benefits. Not self-directed.

## SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Craig Roth IRA
- Craig Roth Traditional IRA
- Danette Roth IRA (Owner: SP)

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**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:** Craig Riedel , 07/10/2023