



Filing ID #10061447

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Eric Levinson  
**Status:** Congressional Candidate  
**State/District:** NC14

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 07/24/2024  
**Period Covered:** 01/01/2023– 06/14/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset  | Owner | Value of Asset          | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|-------------------------|----------------|-------------------------------|-----------------------|
| Bank of America Checking Account [BA]  |       | \$1,001 - \$15,000      | Interest       | \$1 - \$200                   | \$1 - \$200           |
| Cash Mgt Account ⇒<br>Cash Management Account - Merrill Lynch [BA]                     |       | \$1,001 - \$15,000      | Interest       | \$201 - \$1,000               | \$201 - \$1,000       |
| DESCRIPTION: Two cash accounts at Merrill Lynch  |       |                         |                |                               |                       |
| House [RP]   |       | \$500,001 - \$1,000,000 | None           |                               |                       |
| LOCATION: Davidson/Mecklenburg, NC, US   |       |                         |                |                               |                       |
| John Hancock Life Insurance Policy [WU]  |       | \$15,001 - \$50,000     | None           |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>ARK Autonomous Technology & Robotics ETF (ARKQ)<br>[EF] |       | \$15,001 - \$50,000     | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>Bank of America Cash RASP [IH]                          |       | \$1,001 - \$15,000      | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>BlackRock Emerging Markets Fund Class I (MADCX) [MF]    |       | \$1,001 - \$15,000      | Tax-Deferred   |                               |                       |

| Asset  | Owner | Value of Asset      | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|---------------------|----------------|-------------------------------|-----------------------|
| Merrill Lynch Regular IRA ⇒<br>BlackRock Global Equity Market Neutral Fund - Institutional (BDMIX) [MF]                      |       | \$15,001 - \$50,000 | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>BlackRock Systematic Multi-Strategy Fund Institutional Class (BIMBX) [MF]                     |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>BlackRock Tactical Opportunities Fund - Institutional (PBAIX) [MF]                            |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>BlackRock U.S. Equity Factor Rotation ETF (DYNF) [EF]   |       | \$15,001 - \$50,000 | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>Franklin DynaTech Fund Class Advisor (FDYZX) [MF]   |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>Global X Autonomous & Electric Vehicles ETF (DRIV) [EF]                                       |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [EF]                       |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF] |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>Invesco Aerospace & Defense ETF (PPA) [EF]  |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares 10-20 Year Treasury Bond ETF (TLH) [EF]   |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares Convertible Bond ETF (ICVT) [EF]  |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares Core S&P 500 ETF (IVV) [EF]   |       | \$15,001 - \$50,000 | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares Currency Hedged MSCI EAFE ETF (HEFA) [EF]   |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |

| Asset  | Owner | Value of Asset      | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|---------------------|----------------|-------------------------------|-----------------------|
| Merrill Lynch Regular IRA ⇒<br>iShares Cybersecurity and Tech ETF (IHAK) [EF]                    |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares Global Consumer Discretionary ETF (RXI) [EF]              |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares GSCI Commodity Dynamic Roll Strategy ETF (COMT) [EF]      |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares MSCI EAFE Growth ETF (EFG) [EF]                           |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares MSCI EAFE Value ETF (EFV) [EF]                            |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares MSCI Emerging Markets ex China ETF (EMXC) [EF]            |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares MSCI USA Momentum Factor ETF (MTUM) [EF]                  |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares MSCI USA Quality Factor ETF (QUAL) [EF]                   |       | \$15,001 - \$50,000 | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares S&P 500 Growth ETF (IVW) [EF]                             |       | \$15,001 - \$50,000 | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares S&P 500 Value ETF (IVE) [EF]                              |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares U.S. Broker-Dealers & Securities Exchanges ETF (IAI) [EF] |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares U.S. Health Care Providers ETF (IHF) [EF]                 |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>iShares U.S. Infrastructure ETF (IFRA) [EF]                       |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |

| Asset   | Owner | Value of Asset      | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|---------------------|----------------|-------------------------------|-----------------------|
| Merrill Lynch Regular IRA ⇒<br>iShares U.S. Technology ETF (IYW) [EF]                                 |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>MFS Core Equity Fund Class I (MRGRX) [MF]                              |       | \$15,001 - \$50,000 | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>Principal Fds, Inc. Real Estate Securities Fd Instl Cl<br>(PIREX) [MF] |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>SPDR Select Sector Fund - Consumer Discretionary (XLY)<br>[EF]         |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>SPDR Select Sector Fund - Consumer Staples (XLP) [EF]                  |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>SPDR Select Sector Fund - Financial (XLF) [EF]                         |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>SPDR Select Sector Fund - Health Care (XLV) [EF]                       |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>SPDR Select Sector Fund - Technology (XLK) [EF]                        |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>SPDR Select Sector Fund - Utilities (XLU) [EF]                         |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Regular IRA ⇒<br>The Communication Services Select Sector SPDR Fund<br>(XLC) [EF]       |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA ⇒<br>Invesco Preferred ETF (PGX) [EF]  |       | \$1 - \$1,000       | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA ⇒<br>iShares 20+ Year Treasury Bond ETF (TLT) [EF]                             |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA ⇒<br>iShares Core MSCI EAFE ETF (IEFA) [EF]                                    |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA ⇒<br>iShares Core MSCI Emerging Markets ETF (IEMG) [EF]                        |       | \$1,001 - \$15,000  | Tax-Deferred   |                               |                       |

| Asset   | Owner | Value of Asset             | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|----------------------------|----------------|-------------------------------|-----------------------|
| Merrill Lynch Roth IRA =><br>iShares iBoxx \$ Investment Grade Corporate Bond ETF<br>(LQD) [EF] |       | \$1 - \$1,000              | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA =><br>iShares MBS ETF (MBB) [EF]   |       | \$1,001 - \$15,000         | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA =><br>iShares TIPS Bond ETF (TIP) [EF]                                   |       | \$1 - \$1,000              | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA =><br>Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]                    |       | \$1 - \$1,000              | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA =><br>Vanguard Growth ETF (VUG) [EF]                                     |       | \$1,001 - \$15,000         | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA =><br>Vanguard Intermediate-Term Corporate Bond ETF (VCIT)<br>[EF]       |       | \$1,001 - \$15,000         | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA =><br>Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]                |       | \$1,001 - \$15,000         | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA =><br>Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]                 |       | \$1,001 - \$15,000         | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA =><br>Vanguard Small-Cap Growth ETF (VBK) [EF]                           |       | \$1,001 - \$15,000         | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA =><br>Vanguard Small-Cap Value ETF (VBR) [EF]                            |       | \$1,001 - \$15,000         | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA =><br>Vanguard Total International Bond ETF (BNDX) [EF]                  |       | \$1 - \$1,000              | Tax-Deferred   |                               |                       |
| Merrill Lynch Roth IRA =><br>Vanguard Value ETF (VTW) [EF]                                      |       | \$1,001 - \$15,000         | Tax-Deferred   |                               |                       |
| NC Consolidated Judicial Retirement [DB]  |       | \$500,001 -<br>\$1,000,000 | Tax-Deferred   |                               |                       |

\* Investment vehicle 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<br>Current Year to<br>Filing | Amount<br>Preceding Year |
|---|--|-------------------------------------|--------------------------|
| Consolidated Judicial Retirement System of North Carolina | Judicial Retirement Pension  | \$61,020.00                         | \$122,042.00             |
| State of North Carolina                                   | Judicial Emergency Commission work                                     | \$.00                               | \$17,200.00              |
| Levinson Mediation Svcs - sole proprietorship             | Work as a mediator and as a potential expert witness in one court case | \$962.00                            | \$12,500.00              |

## SCHEDULE D: LIABILITIES

| Owner Creditor                          | Date Incurred  | Type   | Amount of Liability |
|---|----------------|--|---------------------|
| Prudential Retirement (now Empower Co.) | September 2023 | General loan against individual retirement holdings. | \$15,001 - \$50,000 |

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

| Date         | Parties To                                | Terms of Agreement   |
|--------------|---|--|
| January 2019 | Eric Levinson and State of North Carolina | The State of NC has a contractual obligation to continue to pay a pension + provide health benefits because of my 24+ years of service to the State of NC. |
| July 2020    | Eric Levinson and US Army                 | I was commissioned as an officer into the US Army JAG Corps Reserves for a period of 8 years beginning July 2020.  |

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

| Source (Name and Address)                   | Brief Description of Duties |
|---|-----------------------------|
| Caldwell, Carson, et. al. (Atlanta, GA, US) | Review of case materials.   |

## SCHEDULE A INVESTMENT VEHICLE DETAILS

- Cash Mgt Account  
LOCATION: US

- Merrill Lynch Regular IRA
- Merrill Lynch Roth IRA

## **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:** Eric Levinson , 07/24/2024