



Filing ID #10053001

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Greg Landsman  
**Status:** Member  
**State/District:** OH01

## FILING INFORMATION

**Filing Type:** New Filer Report  
**Filing Year:** 2022  
**Filing Date:** 08/13/2023  
**Period Covered:** 01/01/2021– 12/31/2022

## 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 - HSA [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		
Fifth Third bank accounts [BA]		\$1,001 - \$15,000	None		
Greg Landsman Roth IRA ⇒ Cash [IH]		\$1,001 - \$15,000	Tax-Deferred		
Greg Landsman Roth IRA ⇒ First Trust Dorsey Wright Focus 5 ETF (FV) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Rockefeller Capital Management (1) ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		None	Capital Gains	Not Applicable	\$2,501 - \$5,000
Rockefeller Capital Management (1) ⇒ Ameriprise Financial, Inc. (AMP) [ST]		None	Capital Gains, Dividends	Not Applicable	\$5,001 - \$15,000
Rockefeller Capital Management (1) ⇒ Diamondback Energy, Inc. (FANG) [ST]		\$1,001 - \$15,000	None		
Rockefeller Capital Management (1) ⇒ Dollar General Corporation (DG) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Rockefeller Capital Management (1) ⇒ Estee Lauder Companies, Inc. (EL) [ST]		None	Capital Gains	Not Applicable	\$1,001 - \$2,500
Rockefeller Capital Management (1) ⇒ First Trust Dorsey Wright Focus 5 ETF (FV) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	Not Applicable	\$201 - \$1,000
Rockefeller Capital Management (1) ⇒ Honeywell International Inc. (HON) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Rockefeller Capital Management (1) ⇒ Linde plc Ordinary Shares (LIN) [ST]		\$15,001 - \$50,000	None		
Rockefeller Capital Management (1) ⇒ NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	None		
Rockefeller Capital Management (1) ⇒ NVIDIA Corporation (NVDA) [ST]		None	Capital Gains, Dividends	Not Applicable	\$1,001 - \$2,500
Rockefeller Capital Management (1) ⇒ Pioneer Natural Resources Company (PXD) [ST]		None	Capital Gains, Dividends	Not Applicable	\$1,001 - \$2,500
Rockefeller Capital Management (1) ⇒ United Rentals, Inc. (URI) [ST]		\$1,001 - \$15,000	None		
Rockefeller Capital Management (1) ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		None	Capital Gains, Dividends	Not Applicable	\$1,001 - \$2,500
Rockefeller Capital Management (2) ⇒ Amazon.com, Inc. (AMZN) [ST]		\$15,001 - \$50,000	None		
Rockefeller Capital Management (2) ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	None		
Rockefeller Capital Management (2) ⇒ Bristol-Myers Squibb Company (BMY) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Rockefeller Capital Management (2) ⇒ Cash [BA]		\$1,001 - \$15,000	None		
Rockefeller Capital Management (2) ⇒ Costco Wholesale Corporation (COST) [ST]		\$15,001 - \$50,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Rockefeller Capital Management (2) ⇒ Exxon Mobil Corporation (XOM) [ST]		\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
Rockefeller Capital Management (2) ⇒ Fifth Third Bancorp (FITB) [ST]		\$1,001 - \$15,000	None		
Rockefeller Capital Management (2) ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$15,001 - \$50,000	Dividends	Not Applicable	\$201 - \$1,000
Rockefeller Capital Management (2) ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		None	Capital Gains	Not Applicable	\$5,001 - \$15,000
Rockefeller Capital Management (2) ⇒ Microsoft Corporation (MSFT) [ST]		\$50,001 - \$100,000	Dividends	Not Applicable	\$201 - \$1,000
Rockefeller Capital Management (2) ⇒ Pfizer, Inc. (PFE) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Rockefeller Capital Management (2) ⇒ Philip Morris International Inc (PM) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Rockefeller Capital Management (2) ⇒ Phillips 66 (PSX) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Rockefeller Capital Management (2) ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Dividends	Not Applicable	\$1,001 - \$2,500
Rockefeller Capital Management (2) ⇒ Simon Property Group, Inc. (SPG) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Sarah Landsman IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Amazon.com, Inc. (AMZN) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Apple Inc. (AAPL) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Sarah Landsman IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Cash [IH]					
Sarah Landsman IRA ⇒ Danaher Corporation (DHR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Diamondback Energy, Inc. (FANG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Dollar General Corporation (DG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Equinix, Inc. (EQIX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Estee Lauder Companies, Inc. (EL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ First Trust Financials AlphaDEX (FXO) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Sarah Landsman IRA ⇒ First Trust Industrials AlphaDEX (FXR) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ First Trust Nasdaq BuyWrite Income ETF (FTQI) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Home Depot, Inc. (HD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Honeywell International Inc. (HON) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Horizon Therapeutics Public Limited Company - Ordinary Shares (HZNP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Linde plc Ordinary Shares (LIN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Microsoft Corporation (MSFT) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Sarah Landsman IRA ⇒ NextEra Energy, Inc. (NEE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Sarah Landsman IRA ⇒ O'Reilly Automotive, Inc. (ORLY) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Parker-Hannifin Corporation (PH) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Pioneer Natural Resources Company (PXD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Raytheon Technologies Corporation (RTX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ TE Connectivity Ltd. New Switzerland Registered Shares (TEL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Thermo Fisher Scientific Inc (TMO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Trimble Inc. (TRMB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Uber Technologies, Inc. (UBER) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Visa Inc. (V) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Walt Disney Company (DIS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		
Sarah Landsman IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		

\* 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
Cincinatti City Council	Salary	N/A	\$60,646.00
84.51°	Spouse salary	N/A	N/A
Landsman and Associates	Salary	N/A	\$19,800.00
StriveTogether	Salary	N/A	\$26,000.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Fifth Third Bank	March 2013	Home Mortgage	\$50,001 - \$100,000
	Rockefeller Capital Management	December 2021	margin account	\$50,001 - \$100,000
SP	American Express	July 2022	Credit card	\$15,001 - \$50,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Member & Manager	Landsman & Associates, LLC

### SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
KnoweldgeWorks (Cincinnati, OH, US)	consulting
Tauber Foundation (Detroit, MI, US)	Consulting

### SCHEDULE A ASSET CLASS DETAILS

◦ Greg Landsman Roth IRA
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- Rockefeller Capital Management (1) (100% Interest)  
LOCATION: US
- Rockefeller Capital Management (2)  
LOCATION: US
- Sarah Landsman 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:** Hon. Greg Landsman , 08/13/2023