



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 ⇒ 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 ⇒ ARK Autonomous Technology & Robotics ETF (ARKQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Bank of America Cash RASP [IH]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ 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 ⇒ BlackRock Global Equity Market Neutral Fund - Institutional (BDMIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ BlackRock Systematic Multi-Strategy Fund Institutional Class (BIMBX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ BlackRock Tactical Opportunities Fund - Institutional (PBAIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ BlackRock U.S. Equity Factor Rotation ETF (DYNF) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Franklin DynaTech Fund Class Advisor (FDYZX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Global X Autonomous & Electric Vehicles ETF (DRIV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Invesco Aerospace & Defense ETF (PPA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares 10-20 Year Treasury Bond ETF (TLH) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares Convertible Bond ETF (ICVT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ 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 ⇒ iShares Cybersecurity and Tech ETF (IHAK) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares Global Consumer Discretionary ETF (RXI) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares GSCI Commodity Dynamic Roll Strategy ETF (COMT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares MSCI EAFE Growth ETF (EFG) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares MSCI EAFE Value ETF (EFV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares MSCI Emerging Markets ex China ETF (EMXC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares S&P 500 Growth ETF (IVW) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares S&P 500 Value ETF (IVE) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares U.S. Broker-Dealers & Securities Exchanges ETF (IAI) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares U.S. Health Care Providers ETF (IHF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ 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 ⇒ iShares U.S. Technology ETF (IYW) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ MFS Core Equity Fund Class I (MRGRX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Principal Fds, Inc. Real Estate Securities Fd Instl Cl (PIREX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Invesco Preferred ETF (PGX) [EF]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ 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 ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [EF]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares MBS ETF (MBB) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares TIPS Bond ETF (TIP) [EF]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Growth ETF (VUG) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Small-Cap Growth ETF (VBK) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Total International Bond ETF (BNDX) [EF]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Tax-Deferred		
NC Consolidated Judicial Retirement [DB]		\$500,001 - \$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 Current Year to Filing	Amount 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

o 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