



Filing ID #10047969

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Tom O'Halleran
Status: Member
State/District: AZ01

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 05/16/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Arizona State Retirement System [DB]		Undetermined	Pension Distribution	\$2,501 - \$5,000	<input type="checkbox"/>
BMO Harris Bank Account [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Chase Bank Accounts [BA]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Chicago Teachers Pension Fund [DB]	SP	Undetermined	Pension Distribution	\$15,001 - \$50,000	<input type="checkbox"/>
Horseshoe Bend, LLC and O'Halleran Commodities, Inc. Profit Sharing Plan and Trust [RP]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Yavapai County, AZ, US					
DESCRIPTION: The land in Yavapai County, Arizona is owned 100% by Horseshoe Bend LLC (LLC). The Member owns 13.08% of the LLC and the remaining 86.92% of the LLC is owned by O'Halleran Commodities, Inc. Profit Sharing Plan and Trust (Plan). The Plan is owned 100% by the Member. This Plan was created effective as of October 31, 1980 and was originally named the O'Halleran Commodities, Inc. Pension Plan and Trust but changed to O'Halleran Commodities, Inc. Profit Sharing Plan and Trust in 2008. Market Value.					
O'Halleran Family Trust, Primary Personal Residence [RP]		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
LOCATION: Village of Oak Creek, AZ, US					
Spouse IRA ⇒	SP	\$100,001 -	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Apple Inc. (AAPL) [ST]		\$250,000			
Whole Life Insurance - Mass Mutual [WU]	SP	\$100,001 - \$250,000		None	<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

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Arizona State Retirement System	Pension Payment	\$4,595.00
Chicago Teachers Pension Fund	Pension Payment - Spouse	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2001	Tom O'Halleran and Arizona State Retirement System	Pension plan agreement between Tom O'Halleran and Arizona State Retirement System

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

- Spouse IRA (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. Tom O'Halleran , 05/16/2022