



Filing ID #10047026

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. Michael R. Turner  
**Status:** Member  
**State/District:** OH10

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 07/5/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Congressional Federal Credit Union [BA] [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Day Air Credit Union [BA] [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Georgetown University Alumni & Student Federal Credit Union [BA] [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
IRA 9527 ⇒ First Trust Cloud Computing ETF (SKYY) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ First Trust DJ Internet Index Fund (FDN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares Biotechnology ETF (IBB) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ iShares Core MSCI EAFE ETF (IEFA) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA 9527 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ iShares MBS ETF (MBB) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares U.S. Regional Banks ETF (IAT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Pacer Benchmark Data & Infrastructure Real Estate SCTR ETF (SRVR) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ ProShares Online Retail ETF (ONLN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Real Estate Select Sector SPDR Fund (XLRE) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR Bloomberg 1-3 Month T-Bill ETF (BIL) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ SPDR S&P Transportation ETF (XTN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Financial (XLF) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care (XLV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ The Communication Services Select Sector SPDR Fund		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
(XLC) [ST]					
IRA 9527 ⇒ TSTXX Blackrock Liquidity Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Consumer Staples ETF (VDC) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Industrials ETF (VIS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Materials ETF (VAW) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Small-Cap ETF (VB) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Key Bank [BA] [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Money Market Account Merrill Lynch - 33813 [BA] [BA]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Ohio State PERS [PE]		\$15,001 - \$50,000	Tax-Deferred		<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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA 9527 ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [ST]		07/12/2021	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [ST]		01/12/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		01/14/2021	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		07/12/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares MBS ETF (MBB) [ST]		01/12/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares MBS ETF (MBB) [ST]		07/12/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares U.S. Regional Banks ETF (IAT) [ST]		07/12/2021	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Pacer Benchmark Data & Infrastructure Real Estate SCTR ETF (SRVR) [ST]		07/12/2021	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Real Estate Select Sector SPDR Fund (XLRE) [ST]		11/17/2021	P	\$1,001 - \$15,000	
IRA 9527 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]		07/12/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]		03/9/2021	P	\$1,001 - \$15,000	
IRA 9527 ⇒ SPDR Select Sector Fund - Financial (XLF) [ST]		07/12/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care (XLV) [ST]		01/12/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA 9527 ⇒		07/12/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
SPDR Select Sector Fund - Health Care (XLV) [ST]			(partial)		<input type="checkbox"/>
IRA 9527 ⇒ The Communication Services Select Sector SPDR Fund (XLC) [ST]		01/12/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA 9527 ⇒ The Communication Services Select Sector SPDR Fund (XLC) [ST]		11/17/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Consumer Staples ETF (VDC) [ST]		01/12/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Consumer Staples ETF (VDC) [ST]		03/9/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Industrials ETF (VIS) [ST]		10/20/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [ST]		01/12/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [ST]		11/17/2021	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [ST]		01/12/2021	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [ST]		10/20/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Materials ETF (VAW) [ST]		07/12/2021	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [ST]		01/12/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [ST]		10/20/2021	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Vanguard Small-Cap ETF (VB) [ST]		01/12/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA 9527 ⇒ Vanguard Small-Cap ETF (VB) [ST]		11/17/2021	P	\$1,001 - \$15,000	

\* 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

None disclosed.

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America Mortgage	June 2020	home mortgage	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 1994	Myself & the State of Ohio	Continued Participation in the Legislative Pension Plan

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Association of Marshall Scholars	11/19/2021	11/23/2021	Washington DC - Oxford, United Kingdom - London, United Kingdom - Washington DC	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

◦ IRA 9527

## 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. Michael R. Turner , 07/5/2022