



Filing ID #10038318

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2019
Filing Date: 08/13/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Apple Inc. (AAPL) [ST] DESCRIPTION: Apple, Inc. (AAPL)	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
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"/>
Freeport-McMoRan, Inc. (FCX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
O'Halleran Commodities Pension and Trust dated 1980, Land in Yavapai County, Arizona [RP] LOCATION: Yavapai County, AZ, US DESCRIPTION: Market Value		\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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, Cash, Money Market Funds [IH]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Wheaton Precious Metals Corp Common Shares (WPM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Whole Life Insurance - Mass Mutual [WU]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>

* 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	\$4,750.00
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.

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 , 08/13/2020