



Filing ID #10046123

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. David B. McKinley  
**Status:** Member  
**State/District:** WV01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 05/12/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
191 Bethany Pike, Wheeling, WV 26003 [RP]	JT	\$50,001 - \$100,000	Rent	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: Wheeling/Ohio, OH, US					
Abbott Laboratories (ABT) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Accenture plc Class A Ordinary Shares (ACN) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Activision Blizzard, Inc (ATVI) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Akamai Technologies, Inc. (AKAM) [ST]	JT	None	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Alphabet Inc. - Class A (GOOGL) [ST]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
American General Life Insurance [WU]	SP	\$1,001 - \$15,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Anthem, Inc. (ANTM) [ST]	JT	None	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Apple Inc. (AAPL) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ARK ETF TR Innovation ETF (ARKK) [EF]	JT	\$100,001 - \$250,000	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
AXA Equitable Life Insurance [WU]		\$1,001 - \$15,000	Dividends, Interest	\$201 - \$1,000	<input type="checkbox"/>
BMO Intermediate Tax-free (09658L778) [MF]	JT	None	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Broadcom Inc. (AVGO) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
CACI International, Inc. Class A (CACI) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Cerner Corporation (CERN) [ST]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Costco Wholesale Corporation (COST) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Estee Lauder Companies, Inc. (EL) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Government Cash Reserve (FDRXX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fiserv, Inc. (FISV) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Global Payments Inc. (GPN) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Harding Loevner Intl equity Port Instl (HLMIX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Hartford SMART529 Plan ⇒ Hartford SMART529 Growth Portfolio E [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Hartford SMART529 Plan ⇒ SMART529 Stable Value Fund E [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Home Depot, Inc. (HD) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Intuit Inc. (INTU) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ BlackRock Total Return Inst (MAGQX) [MF]		\$500,001 - \$1,000,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ iShares Core US Aggregate Bond (AGG) [EF]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ iShares Treasury 1-5 Year (IGSB) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Abbott Laboratories (ABT) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ARK ETF TR Innovation ETF (ARKK) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ BlackRock Total Return Institutional (MAHQX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Broadcom Inc. (AVGO) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ CACI International, Inc. Class A (CACI) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ CarMax Inc (KMX) [ST]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA's ⇒ IRA- Spouse ⇒ Costco Wholesale Corporation (COST) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Estee Lauder Companies, Inc. (EL) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Fiserv, Inc. (FISV) [ST]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Global Payments Inc. (GPN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Home Depot, Inc. (HD) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Intuit Inc. (INTU) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Core S&P Small Cap (IJR) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares MSCI EMR MRK Ex China (EMXC) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares TR ISHS 1-5 YR (IGSB) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares TR MSCI USA Mmentm (MTUM) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Jacobs Engineering Group Inc. (J) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ JPMorgan Emerging Mkts Equity Class I (JEMSX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Linde plc Ordinary Share (LIN) [ST]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA's ⇒ IRA- Spouse ⇒ Mastercard Incorporated (MA) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ O'Reilly Automotive, Inc. (ORLY) [ST]		\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ QUALCOMM Incorporated (QCOM) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ S&P Global Inc. (SPGI) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Stanley Black & Decker, Inc. (SWK) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Starbucks Corporation (SBUX) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Thermo Fisher Scientific Inc (TMO) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ TJX Companies, Inc. (TJX) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Tractor Supply Company (TSCO) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Intl Growth Admiral (VWILX) [MF]		\$50,001 - \$100,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Russell 1000 Index ETF (VONV) [EF]		\$100,001 - \$250,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Tax-managed Intl FD FTSE Dev Mkt (VEA) [EF]		\$250,001 - \$500,000		Tax-Deferred	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA's ⇒ IRA- Spouse ⇒ Waste Management, Inc. (WM) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
iShares Core MSCI Emerging (IEMG) [EF]	JT	None	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
iShares Inc Core MSCI Emerging Mkts ETF (IEMG) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares National Muni Bond ETF (MUB) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares National Muni Bond ETF (MUB) [EF]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
iShares Russell 1000 Index Fund (IWB) [EF]	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
iShares Russell 2000 ETF (IWM) [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
iShares S&P 500 (IVV) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares S&P Midcap 400 Index Fund (IJH) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares Short-term National Muni Bond ETF (SUB) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
iShares TIPS Bond ETF (TIP) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
iShares TR MSCI USA Mmentm (MTUM) [EF]	JT	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares TR Rus MD CP GR ETF (IWP) [EF]	JT	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
iShares Trust Core MSCI EAFE ETF (IEFA) [EF]	JT	\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
iShares Trust Core MSCI EAFE ETF (IEFA) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Jacobs Engineering Group Inc. (J) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Linde plc Ordinary Share (LIN) [ST]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Main Street Checking [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Main Street Financial Services Corp (MSWV) [OT]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Owns stock in Main Street Financial Services Corp (ticker - MSWV). 10,000 shares are held in joint registration while 8000 shares are held by DEAB II, which includes a value of approximately \$125,000. DEAB II, whose primary business was in land holdings, were previously reported as being sold in earlier filings. David and Mary jointly own 50% of DEAB II.					
Main Street Financial Services Corp (MSWV) - TOD [PS]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Owns stock in Main Street Financial Services Corp (ticker - MSWV).					
Mastercard Incorporated (MA) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
McKinley Family Life Insurance Trust ⇒ Lincoln National Life Insurance [WU]	DC	\$100,001 - \$250,000	Dividends, Interest	\$2,501 - \$5,000	<input type="checkbox"/>
DESCRIPTION: Represents policy value of assets held in irrevocable life insurance trust for the benefit of the filer's children upon the death of filer and spouse.					
MFS International Growth Fd Cl I (MQGIX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Microsoft Corporation (MSFT) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
O'Reilly Automotive, Inc. (ORLY) [ST]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
QUALCOMM Incorporated (QCOM) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Raytheon Technologies Corporation (RTX) [ST]	JT	None	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Real Estate Ownership and Partnerships ⇒ DEAB LLC rental Property ⇒ DEAB LLC rental property [RP]		\$1,000,001 - \$5,000,000	Dividends, Rent	None	<input type="checkbox"/>
LOCATION: Wheeling/Ohio, WV, US					
Real Estate Ownership and Partnerships ⇒ Preston County, WV Timberland ⇒ Preston County, WV Timberland [RP]		\$15,001 - \$50,000	Timber Sales	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
LOCATION: Preston/Preston, WV, US					
DESCRIPTION: 90 acres of timber land co-owned by 5 others (siblings and extended family of spouse)					
Roper Technologies, Inc. (ROP) [ST]	JT	None	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
RPM International Inc. (RPM) [ST]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
S&P Global Inc. (SPGI) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Starbucks Corporation (SBUX) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Sysco Corporation (SYY) [ST]	JT	None	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Thermo Fisher Scientific Inc (TMO) [ST]	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TJX Companies, Inc. (TJX) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Tractor Supply Company (TSCO) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard intl Equity Index FDS FTSE EMR (VWO) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Muni Tax Exempt (VTEB) [EF]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Vanguard Tax-managed Intl FD FTSE Dev Mkt (VEA) [EF]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Waste Management, Inc. (WM) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
WesBanco Checking [BA]	SP	\$1,001 - \$15,000	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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Activision Blizzard, Inc (ATVI) [ST]	JT	12/8/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
Akamai Technologies, Inc. (AKAM) [ST]	JT	05/14/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Anthem, Inc. (ANTM) [ST]	JT	12/29/2021	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
BMO Intermediate Tax-free (09658L778) [MF]	JT	03/4/2021	P	\$15,001 - \$50,000	
BMO Intermediate Tax-free (09658L778) [MF]	JT	05/13/2021	P	\$100,001 - \$250,000	
BMO Intermediate Tax-free (09658L778) [MF]	JT	12/6/2021	S	\$100,001 - \$250,000	<input type="checkbox"/>
Broadcom Inc. (AVGO) [ST]	JT	09/20/2021	P	\$15,001 - \$50,000	
Cerner Corporation (CERN) [ST]	JT	05/14/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Cisco Systems, Inc. (CSCO) [ST]	JT	12/29/2021	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Hartford SMART529 Plan ⇒ Hartford SMART529 Age-based Portfolio 18+ E [MF]		03/16/2021	P	\$1,001 - \$15,000	
Hartford SMART529 Plan ⇒ Hartford SMART529 Age-based Portfolio 18+ E [MF]		04/21/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Hartford SMART529 Plan ⇒ Hartford SMART529 Age-based Portfolio 18+ E [MF]		03/16/2021	P	\$1,001 - \$15,000	
Hartford SMART529 Plan ⇒ Hartford SMART529 Growth Portfolio E [MF]		03/16/2021	E	\$1,001 - \$15,000	
DESCRIPTION: Transfer in (exchange) of assets from the 529 plan owned by David B. McKinley (beneficiary Bennett McKinley). Account is registered with Jackson Boyle as beneficiary.					
Hartford SMART529 Plan ⇒ Hartford SMART529 Growth Portfolio E [MF]		03/16/2021	E	\$1,001 - \$15,000	
DESCRIPTION: Transfer of assets out of the 529 plan owned by David B. McKinley (beneficiary Bennett McKinley) to the 529 plan owned by David					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
B. McKinley (Jackson Boyle as beneficiary).					
Hartford SMART529 Plan ⇒ Hartford SMART529 Growth Portfolio E [MF]		03/16/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Hartford SMART529 Plan ⇒ SMART529 Stable Value Fund E [MF]		03/16/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
Hartford SMART529 Plan ⇒ SMART529 Stable Value Fund E [MF]		03/16/2021	E	\$1,001 - \$15,000	
DESCRIPTION: Transfer of assets out of the 529 plan owned by David B. McKinley (beneficiary Bennett McKinley) to the 529 plan owned by David B. McKinley (Jackson Boyle as beneficiary).					
Hartford SMART529 Plan ⇒ SMART529 Stable Value Fund E [MF]		03/16/2021	E	\$1,001 - \$15,000	
DESCRIPTION: Transfer in (exchange) of assets from the 529 plan owned by David B. McKinley (beneficiary Bennett McKinley). Account is registered with Jackson Boyle as beneficiary.					
IRA's ⇒ IRA- Filer ⇒ BlackRock Total Return (MAHQX) [MF]		02/23/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Filer ⇒ BlackRock Total Return (MAHQX) [MF]		11/16/2021	P	\$100,001 - \$250,000	
IRA's ⇒ IRA- Filer ⇒ BlackRock Total Return (MAHQX) [MF]		12/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ BlackRock Total Return Inst (MAHQX) [MF]		04/6/2021	P	\$250,001 - \$500,000	
IRA's ⇒ IRA- Filer ⇒ iShares IBOXX Investment (LQD) [EF]		11/17/2021	S	\$100,001 - \$250,000	<input type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ iShares Treasury (GOVT) [EF]		04/7/2021	S	\$250,001 - \$500,000	<input type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ iShares US Treasury (IGSB) [EF]		02/24/2021	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		08/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Activision Blizzard, Inc (ATVI) [ST]		12/8/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA's ⇒ IRA- Spouse ⇒ Akamai Technologies, Inc. (AKAM) [ST]		03/26/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		08/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Apple Inc. (AAPL) [ST]		08/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ARK Innovation ETF (ARKK) [EF]		02/24/2021	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ARK Innovation ETF (ARKK) [EF]		03/26/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ ARK Innovation ETF (ARKK) [EF]		08/23/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ BlackRock Total Return (MAHQX) [MF]		04/6/2021	P	\$50,001 - \$100,000	
IRA's ⇒ IRA- Spouse ⇒ Broadcom Inc. (AVGO) [ST]		09/20/2021	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ CarMax Inc (KMX) [ST]		02/24/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Cerner Corporation (CERN) [ST]		02/24/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Cerner Corporation (CERN) [ST]		03/26/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Costco Wholesale Corporation (COST) [ST]		02/24/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Estee Lauder Companies, Inc. (EL) [ST]		08/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Fiserv, Inc. (FISV) [ST]		02/24/2021	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
IRA's ⇒ IRA- Spouse ⇒ Global Payments Inc. (GPN) [ST]		02/24/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Intuit Inc. (INTU) [ST]		08/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Core MSCI Emerging (IEMG) [EF]		03/26/2021	P	\$100,001 - \$250,000	
IRA's ⇒ IRA- Spouse ⇒ iShares Core MSCI Emerging (IEMG) [EF]		08/23/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Core S&P Small Cap (IJR) [EF]		02/24/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Core S&P Small Cap (IJR) [EF]		03/26/2021	P	\$50,001 - \$100,000	
IRA's ⇒ IRA- Spouse ⇒ iShares Core S&P Small Cap (IJR) [EF]		08/23/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ iShares Investment Grade (LQD) [EF]		02/24/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ iShares Investment Grade Bond (LQD) [EF]		08/23/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares MSCI Emerging ex-China (EMXC) [EF]		08/23/2021	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ iShares Russell Midcap (IWP) [EF]		03/26/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Treasury (IGSB) [EF]		02/24/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ iShares Treasury 1-5 Year (IGSB) [EF]		08/23/2021	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ iShares US Aggregate Bond (AGG) [EF]		02/24/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒		02/24/2021	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares US Treasury (GOVT) [EF]					
IRA's ⇒ IRA- Spouse ⇒ iShares US Treasury (GOVT) [EF]		04/7/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ JPMorgan Emerging Markets (JEMSX) [MF]		08/20/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ JPMorgan Emerging Markets Equity (JEMSX) [MF]		02/24/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ JPMorgan Emerging Mkts (JEMSX) [MF]		03/25/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Linde plc Ordinary Share (LIN) [ST]		12/8/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ MFS International Growth Fund (MQGIX) [MF]		03/26/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Netflix, Inc. (NFLX) [ST]		02/24/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Netflix, Inc. (NFLX) [ST]		06/1/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Primecap Odyssey Aggressive (POAGX) [MF]		03/25/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Primecap Odyssey Aggressive (POAX) [MF]		02/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Roper Technologies, Inc. (ROP) [ST]		03/26/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Roper Technologies, Inc. (ROP) [ST]		03/26/2021	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ RPM International Inc. (RPM) [ST]		02/24/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ RPM International Inc. (RPM) [ST]		09/20/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA's ⇒ IRA- Spouse ⇒ Stanley Black & Decker, Inc. (SWK) [ST]		06/1/2021	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Thermo Fisher Scientific Inc (TMO) [ST]		08/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Tractor Supply Company (TSCO) [ST]		08/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Intl Developed Markets (VEA) [EF]		08/23/2021	P	\$50,001 - \$100,000	
IRA's ⇒ IRA- Spouse ⇒ Vanguard Intl Growth (VWILX) [MF]		03/25/2021	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ Vanguard Intl Growth Admiral (VWILX) [MF]		02/23/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Russell 100 Value Index (VONV) [EF]		03/26/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Russell 1000 Value (VONV) [EF]		03/26/2021	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
iShares Core MSCI Emerging (IEMG) [EF]	JT	12/29/2021	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
iShares TIPS Bond (TIP) [EF]	SP	02/5/2021	P	\$1,001 - \$15,000	
Linde plc Ordinary Share (LIN) [ST]	JT	12/8/2021	P	\$15,001 - \$50,000	
Raytheon Technologies Corporation (RTX) [ST]	JT	05/14/2021	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Roper Technologies, Inc. (ROP) [ST]	JT	05/14/2021	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
RPM International Inc. (RPM) [ST]	JT	09/20/2021	S	\$15,001 - \$50,000	<input type="checkbox"/>
Vanguard Muni Tax Exempt (VTEB) [EF]	JT	12/7/2021	P	\$100,001 - \$250,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Vanguard Muni Tax Exempt (VTEB) [EF]	JT	12/29/2021	S	\$100,001 - \$250,000	<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 C: EARNED INCOME

None disclosed.

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Maxwell Centre, LLC
Member	DEAB LLC, DEAB II LLC
Board Member - Emeritus	West Virginia Independence Hall Foundation

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Bipartisan Policy Center	08/27/2021	08/28/2021	Pittsburgh - Albany - Pittsburgh	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Hartford SMART529 Plan  
LOCATION: WV
- IRA's
- IRA's ⇒ IRA- Filer
- IRA's ⇒ IRA- Spouse  
DESCRIPTION: Traditional Financial Investments in SEP, IRA, Rollover IRA and Filer-owned are primarily managed by a third party Registered Investment Advisory manager who has discretion for trades.
- McKinley Family Life Insurance Trust (100% Interest) (Owner: DC)  
DESCRIPTION: Irrevocable Life Insurance Trust established by Filer and Spouse for the benefit of their children once both the Filer and Spouse have deceased. Asset disclosed is the Policy Value (Including Cash Surrender Value) of the policies.
- Real Estate Ownership and Partnerships  
LOCATION: WV, US
- Real Estate Ownership and Partnerships ⇒ DEAB LLC rental Property (66% Interest)  
LOCATION: Wheeling, WV, US  
DESCRIPTION: Amount represents Filer's portion
- Real Estate Ownership and Partnerships ⇒ Preston County, WV Timberland (16% Interest)  
LOCATION: Preston, WV, US  
DESCRIPTION: 90 acres Co-owned with 5 others( siblings and extended family)

## **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. David B. McKinley , 05/12/2022