



Filing ID #10053853

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Joyce Beatty  
**Status:** Member  
**State/District:** OH03

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 05/15/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
493 Parkwood Ave. [RP] LOCATION: Columbus/Franklin, OH, US DESCRIPTION: A lot in Franklin County		\$15,001 - \$50,000	None		<input type="checkbox"/>
American Express Company (AXP) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Cardinal Health, Inc. (CAH) [ST]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
CareFusion Corporation (CFN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Columbus Municipal Credit Union [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Congressional Federal Credit Union [BA]		\$1 - \$1,000	Interest	None	<input type="checkbox"/>
Federal Home Loan Mortgage Corporation (FMCC) [ST]		\$1 - \$1,000	Dividends	None	<input type="checkbox"/>
Fifth Third Bank [BA]		\$1,000,001 - \$5,000,000	Interest	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fifth Third Bank [BA]		\$250,001 - \$500,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Huntington Bancshares Incorporated (HBAN) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
ishares Inc. Singapore [MF]		\$1 - \$1,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Joyce and Otto Beatty Scholarship Fund [BA]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Joyce Beatty & Associates, Inc. [BA]		\$100,001 - \$250,000	None		<input type="checkbox"/>
Meta Platforms, Inc. - Class A (META) [ST]		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Nuveen NASDAQ 100 Dynamic Overwrite Fund - Closed End Fund (QQQX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Ohio Credit [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Otto Beatty Law Offices [OL]		None	None		<input type="checkbox"/>
LOCATION: Columbus/Franklin, OH, US DESCRIPTION: Spouse Law Practice					
PNC (Pittsburg National Corp Bank) [BA]		\$100,001 - \$250,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Source Capital, Inc [MF]		\$1,001 - \$15,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Spouse acct.					
Southern Company (SO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Touchstone Flexible Income Fund [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
US Saving Bonds [BA]		\$50,001 - \$100,000	cashed them in	\$50,001 - \$100,000	<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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
1421 Taylor Corners Circle [RP]		01/7/2022	S	\$500,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Columbus/Franklin, OH, US					

\* 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
Ohio Public Employees Retirement System	Retirement for self	\$253,323.12
Ohio Public Employees Retirement System	Spouse pension after death	\$20,000.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 2011	Myself and OPERS	My on-going retirement for 33 years of working service

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?
Ripon Society and Franklin Center	08/7/2022	08/11/2022	Columbus, Ohio, NY, Spain - Madrid - Columbus	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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. Joyce Beatty , 05/15/2023