



Filing ID #10055457

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Eric L. Levinson
Status: Congressional Candidate
State/District: NC12

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 09/13/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bank of America checking account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Cash Mgt Account ⇒ Merrill Lynch CMA [OT] DESCRIPTION: Cash account at Merrill Lynch.		\$15,001 - \$50,000	Interest	\$201 - \$1,000	None
House [RP] LOCATION: Davidson/Mecklenburg, NC, US		\$500,001 - \$1,000,000	Rent	None	\$5,001 - \$15,000
John Hancock Life Insurance Policy [WU]		\$1,001 - \$15,000	None		
Merrill Lynch Regular IRA ⇒ Blackrock Emerging Markets Fund Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Blackrock Eqty Dividend Fund Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Edgewood Growth Fund CL Inst [MF]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fuller & Thaler Behvrl Small Cap Eq Fd Cl Instl [MF]					
Merrill Lynch Regular IRA ⇒ GS GQG Partners Intl OPPS Fd Cl Instl [MF]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ IIAXX [IH]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares Core MSCI International Developed Markets ETF (IDEV) [ST]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares Russell 1000 Growth ETF (IWF) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares Russell 1000 Value ETF (IWD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ iShares U.S. Treasury Bond ETF (GOVT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ MFS Value Fd CL I [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Oakmark Intl Fd CL Institutional [MF]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ PIMCO Investment Grade Credit Bond Fd Cl 12 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [ST]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Vanguard Long-Term Treasury ETF (VGLT) [ST]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Vanguard Mortgage-Backed Securities ETF (VMBS) [ST]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Regular IRA ⇒ Vanguard Russell 1000 Growth ETF (VONG) [ST]		\$1 - \$1,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch Regular IRA ⇒ Vanguard Total International Bond ETF (BNDX) [ST]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Blackrock Emerging Markets Fund, MADCX [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Blackrock Eqty Dividend Fund Instl, MADVX [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Edgewood Growth Fund CL Inst, EGFIX [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Fuller & Thaler Behvrl Small Cap Eq Fd Cl Instl [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ GS GQG Partners Intl OPPS Fd Cl Instl, GSIMX [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ IIAXX, Bank of America, NA RASP [IH]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares 7-10 Year Treasury Bond ETF (IEF) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares Core MSCI Europe ETF (IEUR) [ST]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares Core MSCI International Developed Markets ETF (IDEV) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares Russell 1000 Growth ETF (IWF) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares Russell 1000 Value ETF (IWD) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch Roth IRA ⇒ iShares Treasury Floating Rate Bond ETF (TFLO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ iShares U.S. Treasury Bond ETF (GOVT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ MFS Value Fd CL I, MEIIX [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Oakmark Intl Fd CL Institutional, OANIX [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ PIMCO Investment Grade Credit Bond Fd Cl 12, PBDPX, 9PKW7 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ SPDR Select Sector Fund - Utilities (XLU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ The Communication Services Select Sector SPDR Fund (XLC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard FTSE All World Ex US ETF (VEU) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard FTSE Pacific ETF (VPL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [ST]					
Merrill Lynch Roth IRA ⇒ Vanguard Long-Term Corporate Bond ETF (VCLT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Long-Term Treasury ETF (VGLT) [ST]		\$1 - \$1,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Mortgage-Backed Securities ETF (VMBS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Russell 1000 Growth ETF (VONG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Merrill Lynch Roth IRA ⇒ Vanguard Total International Bond ETF (BNDX) [ST]		\$1 - \$1,000	Tax-Deferred		
NC Consolidated Judicial Retirement [DB]		\$500,001 - \$1,000,000	Tax-Deferred		
Prudential 401K ⇒ NC Fixed Income Fund [MF]		\$50,001 - \$100,000	Tax-Deferred		
Prudential 401K ⇒ NC Fixed Income Index Fund [MF]		\$1 - \$1,000	Tax-Deferred		
Prudential 401K ⇒ NC Inflation Responsive Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Prudential 401K ⇒ NC International Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Prudential 401K ⇒ NC International Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Prudential 401K ⇒ NC Large Cap Core Fund [MF]		\$1 - \$1,000	Tax-Deferred		
Prudential 401K ⇒ NC Large Cap Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Prudential 401K ⇒ NC Small/Mid Cap Core Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Prudential 401K ⇒ NC Small/Mid Cap Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Prudential 401K ⇒ NC Stable Value Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Prudential 401K ⇒ NC Treasury Inflation Protected Securities [MF]		\$1,001 - \$15,000	Tax-Deferred		
Prudential 457 ⇒ NC Fixed Income Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Prudential 457 ⇒ NC Inflation Responsive Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Prudential 457 ⇒ NC International Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Prudential 457 ⇒ NC Large Cap Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Prudential 457 ⇒ NC Small/Mid Cap Core Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Prudential 457 ⇒ NC Stable Value Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Prudential 457 ⇒ NC Treasury Inflation Protected Securities [MF]		\$1,001 - \$15,000	Tax-Deferred		

* 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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
State of North Carolina	Judicial Emergency Commission work	\$15,600.00	\$18,400.00

Consolidated Judicial Retirement System of North Carolina	Judicial Retirement Pension	\$81,361.00	\$122,042.00
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SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo	April 2021	Mortgage on hom	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Sole Proprietor	Levinson Mediation

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2019	Eric Levinson and State of North Carolina	The State of NC has a contractual obligation to continue to pay a pension benefit to me because of my 24+ years of service to the State of NC.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none">o Cash Mgt Account LOCATION: USo Merrill Lynch Regular IRAo Merrill Lynch Roth IRAo Prudential 401Ko Prudential 457

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Eric L. Levinson , 09/13/2023