



Filing ID #10048482

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. David Schweikert  
**Status:** Member  
**State/District:** AZ06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 08/13/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
457(B) PLAN ⇒ BARON GR INST (BGRIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
457(B) PLAN ⇒ PTNM R6 (PEQSX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
529 ⇒ AZ PORTFOLIO 2033 (FIDELITY INDEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
BUSINESS HOLDINGS ⇒ SHERIDAN EQUITIES HOLDINGS LLC [OL]		None		None	<input type="checkbox"/>
LOCATION: FOUNTAIN HILLS, AZ, US DESCRIPTION: REAL ESTATE BUSINESS					
BUSINESS HOLDINGS ⇒ SHERIDAN EQUITIES LLC [OL]		None		None	<input type="checkbox"/>
LOCATION: FOUNTAIN HILLS, AZ, US DESCRIPTION: REAL ESTATE BUSINESS					
INSURANCE ⇒ SFT CORE BOND C2 [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
INSURANCE => SFT INDEX 500 C2 [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS.					
INSURANCE => SFT IVY GROWTH [MF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: MINNESOTA LIFE VARIABLE ASSETS.					
IRA => VT EQUITY INCOME [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA => VT GROWTH OPP [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
SESC - 401(K) => BlackRock LifePath Index 2030 [MF]	SP	\$250,001 - \$500,000	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

None disclosed.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount
PUBLIC SAFETY PERSONNEL RETIREMENT SYSTEM	Retirement	\$49,588.86
Scottsdale Eye Surgery Center	Spouse salary	N/A

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	SALLIE MAE/NAVIENT	JAN 2004	STUDENT LOANS	\$15,001 - \$50,000
	FLAGSTAR BANK	MAY 2020	RESIDENTIAL MORTGAGE	\$250,001 - \$500,000

## SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
MANAGING MEMBER	SHERIDAN EQUITIES LLC
MANAGING MEMBER	SHERIDAN EQUITIES HOLDINGS LLC

## **SCHEDULE F: AGREEMENTS**

<b>Date</b>	<b>Parties To</b>	<b>Terms of Agreement</b>
January 2004	ME AND MARICOPA COUNTY	COUNTY SPONSORED 527 PLAN.

## **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.

## **SCHEDULE A AND B ASSET CLASS DETAILS**

- 457(B) PLAN
- 529  
LOCATION: AZ
- BUSINESS HOLDINGS  
LOCATION: US
- INSURANCE (Owner: SP)
- IRA (Owner: SP)
- SESC - 401(K) (Owner: SP)

## **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 Schweikert , 08/13/2022