



Filing ID #10050139

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Mike Carey
Status: Member
State/District: OH15

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2022
Filing Date: 08/12/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
City Park Interior LLC, 100% Interest [OL] LOCATION: Columbus, OH, US DESCRIPTION: This business is an interior decorating business owned solely by the spouse.	SP	\$100,001 - \$250,000	Business Income	Not Applicable	\$100,001 - \$1,000,000
Fifth Third Bank Account [BA] DESCRIPTION: Spouses personal bank account with Fifth Third Bank.	SP	\$1,001 - \$15,000	None		
Huntington National Bank [BA] DESCRIPTION: Personal Bank Account with Huntington National Bank.		\$1,001 - \$15,000	None		
Investment Limited Partners, LTD - Bank Deposit Sweep Program [IH] DESCRIPTION: This account is held with Investment Limited Partners, LTD. It holds cash awaiting reinvestment.		\$250,001 - \$500,000	None		
Merrill Lynch Brokerage Account [OT] DESCRIPTION: Investment Income from Merrill Lynch Account.	SP	None	Capital Gains, Dividends	Not Applicable	\$15,001 - \$50,000
Merrill Lynch IRA ⇒ AB Small Cap Growth Portfolio Advisor Class (QUAYX) [MF]	SP	\$1,001 - \$15,000	None		

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Merrill Lynch IRA ⇒ AB Sustainable US Thematic Portfolio Advisor Class (FFTYX) [MF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ Allspring Core Plus Bond Fund Class Institutional (WIPIX) [MF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ American Beacon The London Co Income (ABCYX) [MF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ Blackrock Event Driven Equity Fund (BILPX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch IRA ⇒ Cash [BA] DESCRIPTION: Cash held in IRA	SP	\$1,001 - \$15,000	None		
Merrill Lynch IRA ⇒ Columbia Adaptive Risk Allocation Fund (CRAZX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch IRA ⇒ Columbia Convertible Securities Fund (NCIAX) [MF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ Columbia Dividend Income Fund (GSFTX) [MF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ Fidelity Advisor Growth Opportunities Fund Class I (FAGCX) [MF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ Guggenheim Limited Duration Fund (GILHX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch IRA ⇒ Guggenheim Total Return Bond Fund (GIBIX) [MF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ iShares Broad USD High Yield Corporate Bond ETF (USHY) [EF]	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Merrill Lynch IRA ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [EF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ iShares Core S&P Total US Stock Market ETF (ITOT) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch IRA ⇒ iShares Core S&P US Growth ETF (IUSG) [EF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ iShares Core S&P US Value ETF (IUSV) [EF]	SP	\$50,001 - \$100,000	None		
Merrill Lynch IRA ⇒ iShares Russell 1000 Growth ETF (IWF) [MF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ John Hancock Fund International Growth Fund (GOGIX) [MF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ MFS International Diversification Fund (MDIJX) [MF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ Nueberger Berman Intrinsic Value Fund Institutional Class (NINLX) [MF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch IRA ⇒ SPDR Bloomberg 1-3 Month T-Bill ETF (BIL) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch IRA ⇒ SPDR MSCI ACWI ex-US (CWI) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch IRA ⇒ Vanguard Developed Markets Index Fund ETF (VEA) [EF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ Vanguard Emerging Markets Stock Index Fund ETF (VWO) [EF]	SP	\$1,001 - \$15,000	None		
Merrill Lynch IRA ⇒ Vanguard Mortgage-Backed Secs Idx Fund ETF	SP	\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(VMBS) [EF]					
Merrill Lynch IRA ⇒ Vanguard Russell 2000 Index Fund ETF (VTWO) [EF]	SP	\$15,001 - \$50,000	None		
Merrill Lynch IRA ⇒ Vanguard Total Bond Market Index Fund (BND) [EF]	SP	\$1,001 - \$15,000	None		
New York Life Securities [PS] DESCRIPTION: Dividend Income from NYLife Securities	SP	\$15,001 - \$50,000	Dividends	Not Applicable	\$2,501 - \$5,000
Vangaurd Institutional Target Retirement 2035 [OT] DESCRIPTION: 401(k) account with TransAmerica		\$100,001 - \$250,000	None		

* 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
ACNR Coal Services Group Inc.	Salary	N/A	\$223,261.00
ACNR Coal Services Group Inc.	Consultant Income (Business Income)	N/A	\$216,000.00
TransAmerica Retirement Solutions	Excess IRA Contribution	N/A	\$3,234.00
City Park Interiors LLC	Spouse Salary	N/A	N/A
City Park Interiors LLC	Spouse Business Income	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Consultant	ACNR Coal Services Inc.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Merrill Lynch IRA (Owner: SP)

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: Hon. Mike Carey , 08/12/2022