



Filing ID #10056794

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Shane Wilkin
Status: Congressional Candidate
State/District: OH02

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2024
Filing Date: 02/18/2024
Period Covered: 01/01/2023– 01/19/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$201 - \$1,000
CollegeAmerica 529 Savings Plan - Capital Group [5F]		\$15,001 - \$50,000	None		
LOCATION: IN DESCRIPTION: 529 College Savings Acct for child					
CollegeAmerica 529 Savings Plan - Capital Group [5F]		\$15,001 - \$50,000	None		
LOCATION: IN DESCRIPTION: 529 College Savings Acct for child					
Investment Property in Mays Lick, KY [RP]		\$50,001 - \$100,000	Sale of Portion of Property	None	\$2,501 - \$5,000
LOCATION: Mason County, KY, US					
Ohio Deferred Compensation [OT]		\$15,001 - \$50,000	None		
DESCRIPTION: Voluntary supplemental 457(b) retirement plan for Ohio public employees					
Ohio Deferred Compensation [OT]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: Voluntary supplemental 457(b) retirement plan for Ohio public employees					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ohio Public Employees Retirement System [PE]		\$100,001 - \$250,000	None		
DESCRIPTION: State of Ohio retirement fund					
Ohio Public Employees Retirement System [PE]	SP	\$50,001 - \$100,000	None		
DESCRIPTION: Spouse State of Ohio Retirement Fund					
Tri-Vest LLC [OL]		\$100,001 - \$250,000	Ownership Interest	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Hillsboro, OH, US					
DESCRIPTION: Income from ownership interest					

* 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 Ohio	State Senator salary	\$12,974.82	\$77,471.70
Realtor	Realtor Services	N/A	\$8,976.00
State of Ohio	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Tri-Vest LLC

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

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: Shane Wilkin , 02/18/2024