



Filing ID #10053109

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Max Miller
Status: Member
State/District: OH07

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2022
Filing Date: 05/12/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
1437 Rhode Island Ave. NW [RP]	None	Rent	None	\$5,001 - \$15,000	
LOCATION: Washington, DC, US DESCRIPTION: Asset sold in 2022					
1907 Wynwood Drive [RP]		\$1,000,001 - \$5,000,000	None		
LOCATION: Rocky River, OH, US					
1989 Trust ⇒ Baillie Gifford Long Term Global Growth (BSGLX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
1989 Trust ⇒ Blackstone Mortgage Trust, Inc. (BXMT) [ST]	None		Dividends	None	\$2,501 - \$5,000
1989 Trust ⇒ Brookfield Asset Management Inc. (BAM) [ST]	None		Dividends	None	\$2,501 - \$5,000
1989 Trust ⇒ Brookfield Property Partners L.P. - 6.25% Class A Cumulative Redeemable Preferred Units, Series 1 (BPYPM) [ST]	None		Capital Gains, Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
1989 Trust ⇒ Fidelity Mid Cap Index Fund (FSMDX) [EF]		None	Dividends	None	\$201 - \$1,000
1989 Trust ⇒ Fidelity Treasury Money Market Fund [MF]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
1989 Trust ⇒ iAngels - Immunai [HE]		\$100,001 - \$250,000	None		
1989 Trust ⇒ iShares MSCI Emerging Markets Ex China (EMXC) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
1989 Trust ⇒ JPMorgan Equity Premium ETF [EF]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$201 - \$1,000
1989 Trust ⇒ Mondrian Global Equity Value Fund (MPGVX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
1989 Trust ⇒ Nationwide International Small Cap (NWXVX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
1989 Trust ⇒ Natixis Gateway Y (GTEYX) [MF]		None	Dividends	None	\$201 - \$1,000
1989 Trust ⇒ Ninety One Global Franchise (ZGFIX) [MF]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
1989 Trust ⇒ Promissory Note Receivable - Max Miller [OT]		\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Promissory Note Receivable to Max Miller; Listed as liability to Max Miller personally					
1989 Trust ⇒ Prudential Total Return Bond Z (PDBZX) [MF]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
1989 Trust ⇒ The Merger Fund CL I (MERIX) [MF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
1989 Trust ⇒ Vanguard Mid-Cap Index Fund [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
1989 Trust ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
1989 Trust ⇒ Vanguard Total World Stock [EF]		None	Dividends	None	\$201 - \$1,000
1989 Trust ⇒ Vanguard Ultra Short Term Bond Admiral [MF]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$201 - \$1,000
2009 Trust ⇒ Cliffwater Corporate Lending Fund I [OT]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
DESCRIPTION: Interval Fund					
2009 Trust ⇒ Fidelity 500 Index Fund [MF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
2009 Trust ⇒ Fidelity Mid Cap Index Fund (FSMDX) [BA]		None	Dividends	None	\$201 - \$1,000
2009 Trust ⇒ Fidelity Treasury Money Market Fund (FZFX) [BA]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
2009 Trust ⇒ Goldman Sachs Small Cap Value Insights Fund I [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2009 Trust ⇒ iShares MSCI Emerging Markets Ex China (EMXC) [BA]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
2009 Trust ⇒ JPMorgan Equity Premium ETF [MF]		\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	\$1,001 - \$2,500
2009 Trust ⇒ Loomis Sayles Small Cap Growth Instl [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
2009 Trust ⇒ Lord Abbett Short Duration Income Fund Class I [MF]		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	\$201 - \$1,000
2009 Trust ⇒ Mainstay CBRE Global Infrastructure Mutual Fund [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
2009 Trust ⇒ Mondrian Global Equity Value Fund (MPGVX) [BA]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
2009 Trust ⇒ Nationwide International Small Cap (NWXVX) [BA]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
2009 Trust ⇒ Natixis Gateway Y (GTEYX) [BA]		None	Dividends	None	\$201 - \$1,000
2009 Trust ⇒ Ninety One Global Franchise (ZGFIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2009 Trust ⇒ PGIM Total Return Bond CL Z [MF]		None	Dividends	None	\$1,001 - \$2,500
2009 Trust ⇒ Prudential High-Yield Z [MF]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
2009 Trust ⇒ Prudential Total Return Bond Z (PDBZX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
2009 Trust ⇒ The Merger Fund CL I (MERIX) [MF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
2009 Trust ⇒ Vanguard Mid-Cap Index Fund [EF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
2009 Trust ⇒ Vanguard S&P 500 ETF (VOO) [EF]		None	Dividends	None	\$1,001 - \$2,500
2009 Trust ⇒ Vanguard Total Bond Market Index Admiral [MF]		None	Dividends	None	\$1 - \$200
2009 Trust ⇒ Vanguard Total World Stock Index ETF [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1 - \$200
2009 Trust ⇒ Vanguard Ultra Short Term Bond Admiral [MF]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$201 - \$1,000
2012 Trust ⇒ Baillie Gifford Long Term Global Growth (BSGLX) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2012 Trust ⇒ Clifswater Corporate Lending Fund I [OT]		\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	\$1,001 - \$2,500
DESCRIPTION: Interval Fund					
2012 Trust ⇒ Elliot Associates, LP (GLAS Funds, LP) [HE]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$2,501 - \$5,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Elliott Associates, LP					
2012 Trust ⇒ Fidelity 500 Index Fund [EF]		None	Dividends	None	\$5,001 - \$15,000
2012 Trust ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]		None	Dividends	None	\$201 - \$1,000
2012 Trust ⇒ Fidelity Treasury Money Market Fund (FZFXX) [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
2012 Trust ⇒ Goldman Sachs Small Cap Value Insights Fund I [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
2012 Trust ⇒ iShares MSCI Emerging Markets Ex China (EMXC) [MF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
2012 Trust ⇒ JPMorgan Equity Premium ETF [EF]		\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	\$1,001 - \$2,500
2012 Trust ⇒ Loomis Sayles Small Cap Growth Instl [MF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	None
2012 Trust ⇒ Lord Abbett Short Duration Income Fund Class I [MF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
2012 Trust ⇒ Mainstay CBRE Global Infrastructure Mutual Fund [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
2012 Trust ⇒ Mercato Partners Travers IV QP, LP (GLAS Funds, LP) [HE]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	None
2012 Trust ⇒ Mondrian Global Equity Value Fund (MPGVX) [MF]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
2012 Trust ⇒ Nationwide International Small Cap (NWXVX) [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
2012 Trust ⇒ Natixis Gateway Y (GTEYX) [MF]		None	Dividends	None	\$1,001 - \$2,500
2012 Trust ⇒ New Water Capital Partners II, LP (GLAS Funds, LP) [HE]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$2,501 - \$5,000	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
2012 Trust ⇒ Ninety One Global Franchise (ZGFIX) [MF]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$201 - \$1,000
2012 Trust ⇒ Prudential High-Yield Z [MF]		\$50,001 - \$100,000	Dividends	\$5,001 - \$15,000	\$2,501 - \$5,000
2012 Trust ⇒ Prudential Total Return Bond Z (PDBZX) [MF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
2012 Trust ⇒ The Merger Fund CL I (MERIX) [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
2012 Trust ⇒ Vanguard Mid-Cap Index Fund [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
2012 Trust ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
2012 Trust ⇒ Vanguard Ultra Short Term Bond Admiral [MF]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$201 - \$1,000
Aquila Calva Properties [OL]	SP	\$100,001 - \$250,000	None		
LOCATION: Westlake, OH, US DESCRIPTION: Real Estate Holding Co Value is Emily's 24.5% of Moreno Family, LP					
Butterfly Properties NYC, LLC [OL]	SP	\$500,001 - \$1,000,000	None		
LOCATION: Westlake, OH, US DESCRIPTION: Real Estate Holding Company Value is Emily's 24.5% of Moreno Family, LP					
CHAMPtitles - Warrants [OT]	SP	None	None		
DESCRIPTION: Warrants					
Chase [BA]	SP	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	\$1 - \$200
Husto, Inc. [HE]		\$15,001 - \$50,000	None		
DESCRIPTION: Travel subscription service					
Hyperbole Investments, LLC [OL]	SP	\$1,000,001 - \$5,000,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
LOCATION: Westlake, OH, US					
DESCRIPTION: Technology Holding Co Value is Emily's 24.5% of Moreno Family, LPP					
Kylo Properties, LLC [OL]	SP	\$250,001 - \$500,000	None		
LOCATION: Westlake, OH, US					
DESCRIPTION: Real Estate Holding Co. Value is Emily's 24.5% of Moreno Family, LP					
M Realty Group, LLC [OL]	SP	\$500,001 - \$1,000,000	None		
LOCATION: Westlake, OH, US					
DESCRIPTION: Emily's 10% ownership interest Real Estate - Hudson, Ohio Real Estate - Middleburg Heights, Ohio					
Pangolin Properties [OL]	SP	\$100,001 - \$250,000	None		
LOCATION: Westlake, OH, US					
DESCRIPTION: Real Estate Holding Co. Value is Emily's 24.5% of Moreno Family, LP					
PNC Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Baillie Gifford Long Term Global Growth (BSGLX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Fidelity Treasury Money Market Fund (FZFX) [BA]		\$1 - \$1,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Revocable Trust ⇒ Fidelity Treasury Money Market Fund (FZFX) [MF]		None	Dividends	\$201 - \$1,000	\$201 - \$1,000
Revocable Trust ⇒ iShares MSCI Emerging Markets Ex China (EMXC) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Mondrian Global Equity Value Fund (MPGVX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Nationwide International Small Cap (NWXVX) [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Natixis Gateway Y (GTEYX) [MF]		None	Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Revocable Trust ⇒ Ninety One Global Franchise (ZGFIX) [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Prudential High-Yield Z [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Prudential Total Return Bond Z (PDBZX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ The Merger Fund CL I (MERIX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Revocable Trust ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ Fidelity Treasury Money Market Fund [MF]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ Nationwide International Small Cap [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ Ninety One Global Franchise (ZGFIX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Roth IRA ⇒ Schwab Total Stock Market Index (SWTSX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Roth IRA - Emily ⇒ Fidelity 500 Index Fund [EF]	SP	\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	\$1,001 - \$2,500
Roth IRA - Emily ⇒ Fidelity Mid-Cap Index Fund Instl Premium [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA - Emily ⇒ Fidelity Treasury Money Market [MF]	SP	\$1 - \$1,000	Interest	\$1 - \$200	None
Roth IRA - Emily ⇒ Lord Abbett Short Duration Income Fund Class I [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$1 - \$200
Roth IRA - Emily ⇒ Prudential High Yield [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA - Emily ⇒ Schwab Emerging Markets Equity ETF [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA - Emily ⇒ Schwab US Small Cap ETF [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA - Emily ⇒ SPDR MSCI ACWI (ex US) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA - Emily ⇒ SPDR Portfolio MSCI Global Stk Market ETF [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Yellowstone Rimac Holdings [HE]		\$50,001 - \$100,000	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
Bernie Moreno for Ohio	Spouse	\$.00	\$35,769.00
US House of Representatives	Salary	\$57,033.00	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
Ruth R. Miller 1989 Grandchildren's Trust		September 2021	Loan	\$250,001 - \$500,000
PNC Bank		March 2022	Mortgage	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board of Trustees	United States Holocaust Memorial Council

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- 1989 Trust
- 2009 Trust
- 2012 Trust
- Revocable Trust
- Roth IRA
- Roth IRA - Emily (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. Max Miller , 05/12/2023