



Filing ID #10040758

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Steve Stivers
Status: Former Member
State/District: OH15

FILING INFORMATION

Filing Type: Terminated Filer Report
Filing Year: 2021
Filing Date: 09/8/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AJ Stivers Trust ⇒ PNC Govt. Money Market Fund [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
AJ Stivers Trust ⇒ Procter & Gamble Company (PG) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
AJ Stivers Trust ⇒ Real Estate (Ripley, Ohio) [RP] LOCATION: Ripley, OH, US		\$1,001 - \$15,000	None		<input type="checkbox"/>
AJ Stivers Trust ⇒ Real Estate (Wheeler County, TX) [RP] LOCATION: Wheeler County, TX, US		\$15,001 - \$50,000	None		<input type="checkbox"/>
Am. Equity Inv. Whole Life Cash Value [WU]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Chase Bank - Checking [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Chase Bank - Savings [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
Chase Roth IRA ⇒		None	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JP Morgan US Government Money Market Fund [MF]					
DESCRIPTION: Value of this asset was below \$1, but above \$0 at close of reporting period.					
Chase Roth IRA ⇒ MFS Growth Fund (MFEGX) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Edward Jones Custodial Account (XXX-XX234) ⇒ Invesco Equity & Income CI A [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Edward Jones Custodial Account (XXX-XX881) ⇒ Invesco Equity & Income CI A [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Huntington Bank - Combined Accounts [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
JP Morgan Chase 401K ⇒ JPMorgan Chase Common Stock Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
JP Morgan Chase 401K ⇒ S&P 500 Index Fund [MF]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
JP Morgan Chase Retirement Plan (Pension) Acct. [PE]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Millennium Trust Company Traditional IRA ⇒ Millennium Trust Company Rollover Traditional IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Held in cash. The Fidelity Rural Metro Account was rolled over to Millennium Trust Company.					
Morgan Stanley Smith Barney IRA ⇒ First Eagle Global A (SGENX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Morgan Stanley Smith Barney IRA ⇒ Franklin Equity Inc A (FISEX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Northwestern Mutual Whole Life (XX-XXX-504) ⇒ Northwestern Mutual Whole Life Policy [WU]		\$15,001 - \$50,000	None		<input type="checkbox"/>
Northwestern Mutual Whole Life Policy [WU]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Northwestern Mutual Whole Life Policy [WU]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
Ohio PERS ⇒ OPERS Bond Index Fund [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Ohio PERS ⇒ OPERS Large Cap Index Fund [MF]	SP	\$50,001 - \$100,000	None		<input type="checkbox"/>
Ohio PERS ⇒ OPERS Non-US Stock Index Fund [MF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ohio PERS ⇒ OPERS Small Cap Index Fund [MF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ohio PERS ⇒ OPERS Stock Index Fund [MF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Ohio PERS Pension Account [PE]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: Rep. Steve Stivers					
Zua Stivers Trust ⇒ Cash [OT]		\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: Portion of trust held in cash.					
Zua Stivers Trust ⇒ iShares MSCI EAFE ETF (EFA) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Zua Stivers Trust ⇒ iShares MSCI Emerging Index Fund (EEM) [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Zua Stivers Trust ⇒ iShares National Muni Bond - MUB ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Zua Stivers Trust ⇒ Nuveen Inter Dur Muni Bond I [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Zua Stivers Trust ⇒ Nuveen Real Estate Secs I - FARCX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Zua Stivers Trust ⇒ ROBECO BOSTON PARTNERS L S RSRCH [MF]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Zua Stivers Trust ⇒ Tiaa Cref Inflation Linked Bond Fund - TIIHX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Zua Stivers Trust ⇒ US Bank Private Client Reserve Money Market Savings [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Zua Stivers Trust ⇒ US Bank Private Client Reserve Money Market Savings [BA]		None	None		<input type="checkbox"/>
Zua Stivers Trust ⇒ Vanguard 500 Index Admiral - VFIAX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Zua Stivers Trust ⇒ Vanguard Total Stock Market Etf [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<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

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	First Merchants Bank (previously Arlington Bank)	August 2011	Home Equity Loan	\$100,001 - \$250,000
JT	Citizens Bank Mortgage (bought from Franklin American Mortgage)	December 2016	Mortgage on Residence in Upper Arlington, OH (not rented)	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

- AJ Stivers Trust
- Chase Roth IRA
- Edward Jones Custodial Account (XXX-XX234) (Owner: DC)
LOCATION: OH
- Edward Jones Custodial Account (XXX-XX881) (Owner: DC)
LOCATION: OH
- JP Morgan Chase 401K
- Millennium Trust Company Traditional IRA
DESCRIPTION: Formerly with Fidelity Rural Metro
- Morgan Stanley Smith Barney IRA
DESCRIPTION: Formerly Citigroup (CGM) Morgan Stanley Smith Barney IRA and listed as such on FD 2015.
- Northwestern Mutual Whole Life (XX-XXX-504)
- Ohio PERS (Owner: SP)
- Zua Stivers Trust

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. Steve Stivers , 09/8/2021