



Filing ID #10050740

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Hon. David B. McKinley  
**Status:** Former Member  
**State/District:** WV01

## FILING INFORMATION

**Filing Type:** Terminated Filer Report  
**Filing Year:** 2023  
**Filing Date:** 01/19/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
191 Bethany Pike, Wheeling, WV 26003 [RP]  LOCATION: Wheeling/Ohio, WV, US	JT	\$50,001 - \$100,000	Rent	\$2,501 - \$5,000	<input type="checkbox"/>
Abbott Laboratories (ABT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Accenture plc Class A Ordinary Shares (ACN) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Alphabet Inc. - Class A (GOOGL) [ST]	JT	\$15,001 - \$50,000	Stock Split	None	<input checked="" type="checkbox"/>
Apple Inc. (AAPL) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
AXA Equitable Life Insurance [WU]		\$1,001 - \$15,000	Dividends, Interest	\$201 - \$1,000	<input type="checkbox"/>
Broadcom Inc. (AVGO) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
CACI International, Inc. Class A (CACI) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Costco Wholesale Corporation (COST) [ST]	JT	\$50,001 -	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$100,000			<input type="checkbox"/>
Estee Lauder Companies, Inc. (EL) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Government Cash Reserves (FDRXX) [MF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fiserv, Inc. (FISV) [ST]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
Global Payments Inc. (GPN) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Harding Loevner Intl Equity (HLMIX) [MF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Hartford SMART529 Plan ⇒ The Hartford SMART529 Growth Portfolio E [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Hartford SMART529 Plan ⇒ The SMART529 Stable Value Fund E [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Hartford SMART529 Plan ⇒ The SMART529 Stable Value Fund E [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Home Depot, Inc. (HD) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Intuit Inc. (INTU) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Invesco ETF (QQQJ) [EF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ Black Rock Total Return Institutional (MAHQX) [MF]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ iShares TR ISHS 1 - 5 INVS (IGSB) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA's ⇒ IRA- Spouse ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Arthur J. Gallagher & Co. (AJG) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Black Rock Total Return Institutional (MAHQX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ BlackRock Emerging Markets FD Ink INSL ( MADCX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Broadcom Inc. (AVGO) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ CACI International, Inc. Class A (CACI) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Centene Corporation (CNC) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Costco Wholesale Corporation (COST) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Estee Lauder Companies, Inc. (EL) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Fiserv, Inc. (FISV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Global Payments Inc. (GPN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA's ⇒ IRA- Spouse ⇒ Home Depot, Inc. (HD) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Intuit Inc. (INTU) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Invesco ETF (QQQJ) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Core S&P Small - Cap E (IJR) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares MSCI EMR MRK EX CHNA (EMXC) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares TR EAFE Growth EFT (EFG) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares TR ISHS 1 - 5 INVS (IGSB) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Jacobs Solutions Inc. (J) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Linde plc Ordinary Share (LIN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Mastercard Incorporated (MA) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ O'Reilly Automotive, Inc. (ORLY) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Pacer FDS TR US Cash COWS 100 (COWZ) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ QUALCOMM Incorporated (QCOM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA's ⇒ IRA- Spouse ⇒ Starbucks Corporation (SBUX) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Tesla, Inc. (TSLA) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Thermo Fisher Scientific Inc (TMO) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ TJX Companies, Inc. (TJX) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Tractor Supply Company (TSCO) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Energy Index Fund (VDE) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Scottsdale FDS Vanguard (VONV) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Tax - Managed INTL FD FTSE DEV MKT (VEA) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ W.W. Grainger, Inc. (GWW) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Waste Management, Inc. (WM) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
iShares Core S&P 500 (IVV) [EF]	SP	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	<input type="checkbox"/>
iShares Core S&P Mid Cap (IJH) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares EAFE Growth (EFG) [EF]	JT	\$50,001 - \$100,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares National Muni Bond (MUB) [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
iShares National Muni Bond (MUB) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
iShares Russell 1000 (IWB) [EF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
iShares Russell 2000 (IWM) [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
iShares Russell Mid Cap (IWP) [EF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
iShares TR MSCI USA MMENTM (MTUM) [EF]	JT	None	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
iShares Trust Core MSCI EAFE (IEFA) [EF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
iShares Trust Core MSCI EAFE (IEFA) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Jacobs Solutions Inc. (J) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Linde plc Ordinary Share (LIN) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Main Street Checking [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Main Street Financial Services Corp (MSWV) [PS]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Owns stock in Main Street Financial Services Corp (ticker - MSWV). 10,000 shares are held in joint registration while 8000 shares are held by DEAB II, which includes a value of approximately \$125,000. DEAB II, whose primary business was in land holdings, were previously reported as being sold in earlier filings. David and Mary jointly own 50% of DEAB II.					
Mani Street Financial Services Corp (MSWV) - TOD [PS]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Owns stock in Main Street Financial Services Corp (ticker - MSWV)					
Mastercard Incorporated (MA) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
McKinley Family Life Insurance Trust ⇒ McKinley Family Life Insurance Trust / Lincoln National	DC	\$100,001 - \$250,000	Dividends, Interest	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Life Insurance [WU]					
MFS Intl Growth (MQGIX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Microsoft Corporation (MSFT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
O'Reilly Automotive, Inc. (ORLY) [ST]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
QUALCOMM Incorporated (QCOM) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Real Estate Ownership and Partnerships ⇒ DEAB LLC rental Property ⇒ DEAB LLC Rental Property [RP] LOCATION: Wheeling/Ohio, WV, US		\$1,000,001 - \$5,000,000	Dividends, Rent	None	<input type="checkbox"/>
Real Estate Ownership and Partnerships ⇒ Preston County, WV Timberland ⇒ Preston County, WV Timberland [RP] LOCATION: Preston/Preston, WV, US		\$15,001 - \$50,000	None		<input type="checkbox"/>
S&P Global Inc. (SPGI) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Starbucks Corporation (SBUX) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
The Hartford SMART529 Growth Portfolio E [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Thermo Fisher Scientific Inc (TMO) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
TJX Companies, Inc. (TJX) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Tractor Supply Company (TSCO) [ST]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Muni Bond Tax Exempt (VTEB) [EF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Tax - Managed INTL FD FTSE DEV MKT (VEA) [EF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Waste Management, Inc. (WM) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
WesBanco Checking [BA]	SP	\$1,001 - \$15,000	None		<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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Ark ETF TR Innovation ETF (ARKK) [EF]	JT	05/9/2022	S	\$50,001 - \$100,000	<input type="checkbox"/>
Hartford SMART529 Plan ⇒ The Hartford SMART529 Growth Portfolio E [MF]		06/15/2022	E	\$1,001 - \$15,000	
DESCRIPTION: Transfer of assets out of the 529 plan owned by David B. McKinley (beneficiary Bennett McKinley) to the 529 plan owned by David B. McKinley (David J. McKinley as beneficiary)					
Hartford SMART529 Plan ⇒ The Hartford SMART529 Growth Portfolio E [MF]		06/15/2022	E	\$1,001 - \$15,000	
DESCRIPTION: Transfer in (exchange) of assets from the 529 plan owned by David B. McKinley (beneficiary Bennett McKinley). Account is registered with David J. McKinley as beneficiary.					
Hartford SMART529 Plan ⇒ The Hartford SMART529 Growth Portfolio E [MF]		06/15/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					
Hartford SMART529 Plan ⇒ The Hartford SMART529 Growth Portfolio E [MF]		06/15/2022	P	\$1,001 - \$15,000	
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					
Hartford SMART529 Plan ⇒ The Hartford SMART529 Growth Portfolio E [MF]		07/11/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					
Hartford SMART529 Plan ⇒ The Hartford SMART529 Growth Portfolio E [MF]		07/11/2022	P	\$1,001 - \$15,000	
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Hartford SMART529 Plan ⇒ The Hartford SMART529 Growth Portfolio E [MF]		10/10/2022	P	\$1,001 - \$15,000	
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					
Hartford SMART529 Plan ⇒ The Hartford SMART529 Growth Portfolio E [MF]		10/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					
Hartford SMART529 Plan ⇒ The Smart529 Stable Value Fund E [MF]		10/10/2022	P	\$1,001 - \$15,000	
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					
Hartford SMART529 Plan ⇒ The SMART529 Stable Value Fund E [MF]		06/15/2022	E	\$1,001 - \$15,000	
DESCRIPTION: Transfer of assets out of the 529 plan owned by David B. McKinley (beneficiary Bennett McKinley) to the 529 plan owned by David B. McKinley (David J. McKinley as beneficiary)					
Hartford SMART529 Plan ⇒ The SMART529 Stable Value Fund E [MF]		06/15/2022	E	\$1,001 - \$15,000	
DESCRIPTION: Transfer in (exchange) of assets from the 529 plan owned by David B. McKinley (beneficiary Bennett McKinley). Account is registered with David J. McKinley as beneficiary.					
Hartford SMART529 Plan ⇒ The SMART529 Stable Value Fund E [MF]		06/15/2022	P	\$1,001 - \$15,000	
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					
Hartford SMART529 Plan ⇒ The SMART529 Stable Value Fund E [MF]		06/15/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					
Hartford SMART529 Plan ⇒ The SMART529 Stable Value Fund E [MF]		07/11/2022	P	\$1,001 - \$15,000	
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					
Hartford SMART529 Plan ⇒ The SMART529 Stable Value Fund E [MF]		07/11/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					
Hartford SMART529 Plan ⇒ The SMART529 Stable Value Fund E [MF]		10/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: 529 plan owned by David B McKinley (David J McKinley as beneficiary). Exchange of funds.					
Invesco Exchange Traded FD TR II NASDAQNXTGEN100 (QQQJ) [EF]	JT	05/11/2022	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA's ⇒ IRA- Filer ⇒ iShares TR ISHS 1 - 5 INVS (IGSB) [EF]		11/7/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Abbott Laboratories (ABT) [ST]		09/21/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ARK Innovation ETF (ARKK) [EF]		01/18/2022	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ ARK Innovation ETF (ARKK) [EF]		05/9/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Arthur J. Gallagher & Co. (AJG) [ST]		09/21/2022	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Black Rock Total Return Institutional (MAHQX) [MF]		01/18/2022	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Black Rock Total Return Institutional (MAHQX) [MF]		01/18/2022	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ BlackRock Emerging Markets FD Ink INSL ( MADCX) [MF]		03/1/2022	P	\$50,001 - \$100,000	
IRA's ⇒ IRA- Spouse ⇒ BlackRock Emerging Markets FD Ink INSL ( MADCX) [MF]		07/7/2022	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ BlackRock Emerging Markets FD Ink INSL ( MADCX) [MF]		03/1/2022	P	\$50,001 - \$100,000	
IRA's ⇒ IRA- Spouse ⇒ BlackRock Emerging Markets FD Ink INSL ( MADCX) [MF]		07/7/2022	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ CarMax Inc (KMX) [ST]		09/21/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Centene Corporation (CNC) [ST]		09/21/2022	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Costco Wholesale Corporation (COST) [ST]		07/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA's ⇒ IRA- Spouse ⇒ Global Payments Inc. (GPN) [ST]		05/20/2022	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Invesco ETF (QQQJ) [EF]		05/9/2022	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ Invesco ETF (QQQJ) [EF]		07/7/2022	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ Invesco ETF (QQQJ) [EF]		05/9/2022	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ Invesco ETF (QQQJ) [EF]		07/7/2022	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		07/7/2022	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ iShares Core US Aggregate Bond ETF (AGG) [EF]		01/18/2022	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ iShares TR EAFE Growth EFT (EFG) [EF]		08/16/2022	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ iShares TR EAFE Growth EFT (EFG) [EF]		08/16/2022	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ iShares TR ISHS 1 - 5 INVS (IGSB) [EF]		07/7/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ishares TR MSCI USA MM EN TM (MTUM) [EF]		04/4/2022	S	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Jacobs Solutions Inc. (J) [ST]		07/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ JPMorgan Emerging MKTS Equity Class I (JEMSX) [MF]		03/1/2022	S	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ O'Reilly Automotive, Inc. (ORLY) [ST]		07/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒		04/4/2022	P	\$50,001 -	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Pacer FDS TR US Cash COWS 100 (COWZ) [EF]				\$100,000	
IRA's ⇒ IRA- Spouse ⇒ Pacer FDS TR US Cash COWS 100 (COWZ) [EF]		04/4/2022	P	\$50,001 - \$100,000	
IRA's ⇒ IRA- Spouse ⇒ S&P Global Inc. (SPGI) [ST]		09/21/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Stanley Black & Decker, Inc. (SWK) [ST]		09/21/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Tesla, Inc. (TSLA) [ST]		09/21/2022	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		07/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Energy ETF (VDE) [EF]		07/7/2022	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ Vanguard International Growth Admiral (VWILX) [MF]		05/9/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Scottsdale FDS Vanguard (VONV) [EF]		07/7/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Scottsdale FDS Vanguard (VONV) [EF]		05/9/2022	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ Vanguard Tax - Managed INTL FD FTSE DEV MKT (VEA) [EF]		07/7/2022	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Vanguard Tax - Managed INTL FD FTSE DEV MKT (VEA) [EF]		08/16/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Tax - Managed INTL FD FTSE DEV MKT (VEA) [EF]		08/16/2022	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Tax - Managed INTL FD FTSE DEV MKT (VEA) [EF]		07/7/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA's ⇒ IRA- Spouse ⇒ W.W. Grainger, Inc. (GWW) [ST]		09/21/2022	P	\$1,001 - \$15,000	
iShares National Muni Bond (MUB) [EF]	SP	02/18/2022	P	\$1,001 - \$15,000	
iShares National Muni Bond (MUB) [EF]	JT	04/12/2022	S	\$250,001 - \$500,000	<input type="checkbox"/>
iShares National Muni Bond ETF (MUB) [EF]	JT	07/7/2022	P	\$50,001 - \$100,000	
iShares TIPS Bond ETF (TIP) [EF]	SP	02/18/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
iShares TR EAFE GRWTH ETF (EFG) [EF]	JT	08/16/2022	P	\$50,001 - \$100,000	
iShares TR MSCI USA MMENTM (MTUM) [EF]	JT	05/16/2022	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
iShares Trust Core MSCI EAFE ETF ( IEFA) [EF]	JT	08/16/2022	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Vanguard INTL Equity Index FDS FTSE EMR MKT ETF (VWO) [EF]	JT	05/16/2022	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard MUN BD FDS Tax Exempt BD (VTEB) [EF]	JT	05/16/2022	P	\$100,001 - \$250,000	
Vanguard Tax - Managed INTL FD FTSE DEV MKT ETF (VEA) [EF]	JT	08/16/2022	S (partial)	\$1,001 - \$15,000	<input checked="" 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 C: EARNED INCOME

None disclosed.

## SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Maxwell Centre, LLC
Member	DEAB LLC, DEAB II LLC
Board Member - Emeritus	West Virginia Independence Hall Foundation

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

- Hartford SMART529 Plan  
LOCATION: WV
- IRA's
- IRA's ⇒ IRA- Filer
- IRA's ⇒ IRA- Spouse  
DESCRIPTION: Traditional Financial Investments in SEP, IRA, Rollover IRA and Filer-owned are primarily managed by a third party Registered Investment Advisory manager who has discretion for trades.
- McKinley Family Life Insurance Trust (100% Interest) (Owner: DC)  
DESCRIPTION: Irrevocable Life Insurance Trust established by Filer and Spouse for the benefit of their children once both the Filer and Spouse have deceased. Asset disclosed is the Policy Value (Including Cash Surrender Value) of the policies.
- Real Estate Ownership and Partnerships  
LOCATION: WV, US
- Real Estate Ownership and Partnerships ⇒ DEAB LLC rental Property (66% Interest)  
LOCATION: Wheeling, WV, US  
DESCRIPTION: Amount represents Filer's portion
- Real Estate Ownership and Partnerships ⇒ Preston County, WV Timberland (16% Interest)  
LOCATION: Preston, WV, US  
DESCRIPTION: 90 acres Co-owned with 5 others( siblings and extended family)

## 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 B. McKinley , 01/19/2023