



Filing ID #10051993

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Craig Riedel
Status: Congressional Candidate
State/District: OH09

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2023
Filing Date: 05/10/2023

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Europacific Growth CL F3 [MF]	JT	None	Dividends	None	\$2,501 - \$5,000
American Fundamental Investors CL F3 [MF]	JT	None	Dividends	None	\$1,001 - \$2,500
American International Growth & Income CL F3 [MF]	JT	None	Dividends	None	\$1 - \$200
American International Growth & Income CL F3 [MF]	JT	None	Dividends	None	\$1 - \$200
American International Growth & Income CL F3 [MF]	JT	None	Dividends	None	\$1 - \$200
Apple Inc. (AAPL) [ST]	JT	None	Capital Gains, Dividends, Interest	None	\$15,001 - \$50,000
Bridge Builder Core Plus Bond [MF]	JT	None	Dividends	None	\$201 - \$1,000
Bridge Builder INTL Equity [MF]	JT	None	Dividends	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bridge Builder Large Growth [MF]	JT	None	Capital Gains, Dividends	None	\$1 - \$200
Bridge Builder Large Value [MF]	JT	None	Capital Gains, Dividends	None	\$201 - \$1,000
Craig Roth IRA ⇒ American Amcap CL F3 [MF]		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Craig Roth IRA ⇒ American International Growth & Income CL F3 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth IRA ⇒ Hartford Dividend & Growth CL F [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Craig Roth IRA ⇒ Hartford International Opportunities CL F [MF]		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Craig Roth IRA ⇒ Hartford Total Return Bond CL F [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth IRA ⇒ iShares Core S&P Mid Cap ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth IRA ⇒ iShares Core S&P Small Cap ETF [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth IRA ⇒ John Hancock Bond CL R6 [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth IRA ⇒ T Rowe Price US Treasury Money CL I [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Craig Roth Traditional IRA ⇒ American Europacific Growth CL F3 [MF]		\$100,001 - \$250,000	Dividends	None	\$1,001 - \$2,500
Craig Roth Traditional IRA ⇒ American Fundamental Investors CL F3 [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Craig Roth Traditional IRA ⇒ Goldman Sachs Financial Square Government CL I [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Craig Roth Traditional IRA ⇒ iShares Core Dividend Growth ETF [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Craig Roth Traditional IRA ⇒ JP Morgan Emerging Markets Equity CL R6 [MF]		\$15,001 - \$50,000	Dividends	None	\$201 - \$1,000
Craig Roth Traditional IRA ⇒ JP Morgan Growth Advantage CL R6 [MF]		\$100,001 - \$250,000	Dividends	None	\$201 - \$1,000
Craig Roth Traditional IRA ⇒ MFS International Diversification CL R6 [MF]		\$100,001 - \$250,000	Dividends	None	\$2,501 - \$5,000
Craig Roth Traditional IRA ⇒ MFS Mid Cap Growth CL R6 [MF]		\$15,001 - \$50,000	None		
Craig Roth Traditional IRA ⇒ Vanguard S&P 500 ETF [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Craig Roth Traditional IRA ⇒ Vanguard Small Cap Growth ETF [EF]		\$50,001 - \$100,000	Dividends	\$1 - \$200	\$201 - \$1,000
Craig Roth Traditional IRA ⇒ Victory Sycamore Established Value CL R6 [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Craig Roth Traditional IRA ⇒ Victory Sycamore Small Company Opportunity CL R6 [MF]		\$50,001 - \$100,000	Dividends	None	\$5,001 - \$15,000
Danette Roth IRA ⇒ American AMCAP CL F3 [MF]	SP	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Danette Roth IRA ⇒ American International Growth & Income CL F3 [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Danette Roth IRA ⇒ Hartford Dividend & Growth CL F [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Danette Roth IRA ⇒ Hartford International Opportunities CL F [MF]	SP	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Danette Roth IRA ⇒ Hartford Total Return Bond CL F [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Danette Roth IRA ⇒ iShares Core S&P Mid Cap ETF [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Danette Roth IRA ⇒ iShares Core S&P Small Cap ETF [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Danette Roth IRA ⇒ John Hancock Bond CL R6 [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Danette Roth IRA ⇒ T Rowe Price US Treasury Money CL I [MF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Delaware Emerging Markets CL [MF]	JT	None	Dividends	None	\$1 - \$200
DFA Global Real Estate Securities CL I [MF]	JT	None	Capital Gains, Dividends	None	\$1 - \$200
DFA International Small Company CL I [MF]	JT	None	Dividends	None	\$1 - \$200
DFA US Small Cap Value CL I [MF]	JT	None	Capital Gains, Dividends	None	\$1 - \$200
Goldman Sachs Financial Square Government CL I [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford Dividend & Growth CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford Dividend & Growth CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford International Opportunities CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford International Opportunities CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford Total Return Bond CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Hartford Total Return Bond CL F [MF]	JT	None	Dividends	None	\$1 - \$200
Ishares Core Dividend Growth ETF [EF]	JT	None	Dividends	None	\$2,501 - \$5,000
Ishares Core S&P Mid Cap [EF]	JT	None	Dividends	None	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Ishares Core S&P Mid Cap ETF [EF]	JT	None	Dividends	None	\$1 - \$200
Ishares Core S&P Small Cap ETF [EF]	JT	None	Dividends	None	\$1 - \$200
Ishares Core S&P Small Cap ETF [EF]	JT	None	Dividends	None	\$1 - \$200
ISHARES CORE US AGGREGATE BOND [EF]	JT	None	Interest	None	\$201 - \$1,000
ISHARES MSCI EAFE SMALL CAP [EF]	JT	None	Dividends	None	\$1 - \$200
ISHARES TR S&P SMALLCAP [EF]	JT	None	Dividends	None	\$1 - \$200
ISHARES TRUST CORE MSCI EAFE [EF]	JT	None	Dividends	None	\$201 - \$1,000
Jensen Quality Growth CL Y [MF]	JT	None	Capital Gains, Dividends	None	\$201 - \$1,000
John Hancock Bond CL R6 [MF]	JT	None	Dividends	None	\$1 - \$200
John Hancock Disciplined Value CL R6 [MF]	JT	None	Capital Gains, Dividends	None	\$1 - \$200
JPMorgan emerging Markets Equity CL R6 [MF]	JT	None	Dividends	None	\$201 - \$1,000
MFS International Diversification CL R6 [MF]	JT	None	Dividends	None	\$2,501 - \$5,000
T Rowe Price High Yield Bond CL I [MF]	JT	None	Dividends	None	\$1 - \$200
TWC Emerging Markets Income Plan CL P [MF]	JT	None	Dividends	None	\$1 - \$200
VANGUARD FTSE EMERGING MARKETS [EF]	JT	None	Dividends	None	\$1 - \$200
VANGUARD INDEX TR VANGUARD GROWTH [EF]	JT	None	Capital Gains, Dividends	None	\$201 - \$1,000
VANGUARD INDEX TR VANGUARD VALUE [EF]	JT	None	Capital Gains, Dividends	None	\$1,001 - \$2,500
Vanguard Mid Cap ETF [EF]	JT	None	Capital Gains, Dividends	None	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard S&P 500 ETF [EF]	JT	None	Dividends	None	\$2,501 - \$5,000
Vanguard Small Cap Growth ETF [EF]	JT	None	Dividends	None	\$201 - \$1,000
Vanguard Small Cap Growth ETF [EF]	JT	None	Dividends	None	\$1 - \$200
Vanguard Total BD Market ETF [EF]	JT	None	Dividends	None	\$1 - \$200
Victory Sycamore Established Value CL R6 [MF]	JT	None	Dividends	None	\$1,001 - \$2,500
Victory Sycamore Small Company Opportunity CL R6 [MF]	JT	None	Dividends	None	\$201 - \$1,000

* 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
State of Ohio	Salary	N/A	\$75,500.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

◦ Craig Roth IRA

- Craig Roth Traditional IRA
- Danette Roth 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: Craig Riedel , 05/10/2023