



Filing ID #10061083

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Hon. John Joyce  
**Status:** Member  
**State/District:** PA13

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2022  
**Filing Date:** 05/14/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alice Joyce Ameritrade/Charles Schwab IRA ⇒ Ameritrade Brokerage Sweep Account [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Alice Joyce Ameritrade/Charles Schwab IRA ⇒ Northern Lighs Tr Donoghue Forlines Income I - PWRIX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Alice Joyce Ameritrade/Charles Schwab IRA ⇒ Northern Lights Fd Tr Donoghue Forlines Tact Alloc I - GTAIX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Alice Joyce Ameritrade/Charles Schwab IRA ⇒ Northern Lights Fd Tr Risk Mngd Income I - FLOTX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Alice Joyce Ameritrade/Charles Schwab IRA ⇒ Northern Lights Tr Donoghue Forlines Dividend I - PWDIX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Alice Joyce Ameritrade/Charles Schwab IRA ⇒ Northern Lights TR -Donoghue Forlines Momentum I - MOJOX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Altoona Dermatology Associates LLC [OL]	SP	\$250,001 -	Dividends	\$100,001 -	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
		\$500,000		\$1,000,000	
LOCATION: Altoona, PA, US					
DESCRIPTION: Dermatology Practice					
Cabin Group, LLC ⇒ Residential Real Estate [RP]		\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: Altoona, PA, US					
Chester County Pennsylvania Health Ed Facilities Revenue Bond [GS]	SP	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Chester County Pennsylvania Health Ed Facilities Revenue Bond [GS]		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Invesco Pennsylvania Municipal Fund - OPATX [MF]	SP	Spouse/DC Over \$1,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Invesco Pennsylvania Municipal Fund - OPATX [MF]		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Invesco Pennsylvania Municipal Fund - OPATX [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Logan Blvd Office [RP]	SP	\$250,001 - \$500,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: Altoona, PA, US					
M&T Bank Checking Account [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
M&T Bank Savings Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Mairs & Power Growth Fund - MPGFX [MF]	SP	\$500,001 - \$1,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Nuveen High Yield Muni Bond Fund - NHMAX [MF]		\$1,000,001 - \$5,000,000	Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Nuveen High Yield Muni Bond Fund - NHMAX [MF]	SP	Spouse/DC Over \$1,000,000	Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Pennsylvania State Higher Ed Facility Auth Revenue Bond [GS]		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Advisors SouthernSun US Equity I (SSEIX) [MF]					
Stifel Retirement Account - Alice ⇒ Allspring Intl Bond Instl CL [MF]	SP	None		Tax-Deferred	<input checked="" type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Artisan International Value Advisor (APDKX) [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Artisan Value Advisor (APDLX) [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Citigroup Inc Dep Shs Repstg Perpetual [MF]	SP	\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Citigroup Inc Variable Note [CS]	SP	\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Corporate bond					
Stifel Retirement Account - Alice ⇒ Diamond Hill Small Cap I (DHSIX) [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Harding Loevner International Eq Instl (HLMIX) [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Invesco Developing Markets Cl Y [MF]	SP	\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Invesco QQQ Trust Series 1 [MF]	SP	\$50,001 - \$100,000		Tax-Deferred	<input checked="" type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Ishares Tips Bond ETF [MF]	SP	\$50,001 - \$100,000		Tax-Deferred	<input checked="" type="checkbox"/>
Stifel Retirement Account - Alice ⇒ JP Morgan Chase & Co Series Q Variable Note [CS]	SP	\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Corporate note					
Stifel Retirement Account - Alice ⇒ Nuveen High Yield Municipal Bond Fund (NHMRX) [MF]	SP	\$250,001 - \$500,000		Tax-Deferred	<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Phaeian Accent Intl Value [MF]	SP	None		Tax-Deferred	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Stifel Retirement Account - Alice ⇒ RiverPark/Wedgewood Institutional (RWGIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Seagate HDD Cayman Sr Note CPN Due 1/1/25 [CS] DESCRIPTION: Corporate note	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Stifel Money Market Brokerage Sweep Account [BA]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Transamerica Emerging Markets Debt I (EMTIX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Advisors SouthernSun US Equity I (SSEIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Artisan International Value Advisor (APDKX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Artisan Value Advisor (APDLX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Citigroup Inc Dep Shs Rep 1/25 noncumul PFED Ser M [CS] DESCRIPTION: Formerly Citigroup Inc Note (CS)		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Citigroup Inc Dep Shs Repstg [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Diamond Hill Small Cap I (DHSIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Harding Loevner International Eq Instl (HLMIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Invesco Developing Markets [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Invesco QQQ ETF [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Ishares Tips Bond ETF [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Stifel Retirement Account - Filer ⇒ JP Morgan Chase & Co Series Q Variable Note [CS]		\$100,001 - \$250,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Corporate note					
Stifel Retirement Account - Filer ⇒ Nuveen High Yield Municipal Bond Fund (NHMRX) [MF]		\$500,001 - \$1,000,000		Tax-Deferred	<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Phaecean Accent Intl Value [MF]		None		Tax-Deferred	<input checked="" type="checkbox"/>
Stifel Retirement Account - Filer ⇒ RiverPark/Wedgewood Institutional (RWGIX) [MF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Seagate HDD Senior Note [CS]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
DESCRIPTION: Corporate bond					
Stifel Retirement Account - Filer ⇒ Stifel Brokerage Sweep Account [BA]		\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Transamerica Emerging Markets Debt I (EMTIX) [MF]		None		Tax-Deferred	<input checked="" type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Vanguard 500 Index Fund Admiral Shares - DFIAX [MF]		\$15,001 - \$50,000		Tax-Deferred	<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ White Oak Select Growth Fund - WOGSX [MF]		\$50,001 - \$100,000		Tax-Deferred	<input type="checkbox"/>
Torrax Fund - TORYX [MF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Vanguard 500 Index Fund Admiral Shares - VFIAX [MF]		\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Federal Money Market Sweep Account [BA]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Federal Money Market Sweep Account [BA]	SP	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Pennsylvania Municipal Money Market [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Pennsylvania Municipal Money Market Fund - VPTXX [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard US Value Index Admiral [MF]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
White Oak Select Growth Fund [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>

\* Investment vehicle 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?
Invesco Pennsylvania Municipal Fund - OPATX [MF]		06/6/2022	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Invesco Pennsylvania Municipal Fund - OPATX [MF]		06/7/2022	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Invesco Pennsylvania Municipal Fund - OPATX [MF]		06/16/2022	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Invesco Pennsylvania Municipal Fund - OPATX [MF]	SP	06/6/2022	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Invesco Pennsylvania Municipal Fund - OPATX [MF]	SP	06/7/2022	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Invesco Pennsylvania Municipal Fund - OPATX [MF]	SP	06/16/2022	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Allspring Intl Bond Instl CL [MF]	SP	01/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Invesco QQQ ETF [MF]	SP	01/11/2022	P	\$50,001 - \$100,000	
Stifel Retirement Account - Alice ⇒ Ishares Tips Bond ETF [MF]	SP	01/11/2022	P	\$50,001 - \$100,000	
Stifel Retirement Account - Alice ⇒	SP	05/26/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Phaecian Accent Intl Value [MF]					
Stifel Retirement Account - Alice ⇒ Transamerica Emerging Markets Debt I [MF]	SP	01/10/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Invesco QQQ ETF [MF]		01/11/2022	P	\$50,001 - \$100,000	
Stifel Retirement Account - Filer ⇒ Ishares Tips Bond ETF [MF]		01/11/2022	P	\$50,001 - \$100,000	
Stifel Retirement Account - Filer ⇒ Phaecian Accent Intl Value [MF]		05/26/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Transamerica Emerging Markets Debt I [MF]		01/10/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Wels Fargo International Bond Admin (ESCIX) [CS]		01/12/2022	S	\$50,001 - \$100,000	<input type="checkbox"/>
DESCRIPTION: Corporate Bond					

\* Investment vehicle 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
Altoona Dermatology Associates	Spouse salary	N/A

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Ripon Society and The Franklin Center	11/9/2022	11/14/2022	Washington DC - Madrid, Spain - Baltimore, MD	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Alice Joyce Ameritrade/Charles Schwab IRA (Owner: SP)
- Cabin Group, LLC  
LOCATION: US
- Stifel Retirement Account - Alice (Owner: SP)
- Stifel Retirement Account - Filer

## 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. John Joyce , 05/14/2024