



Filing ID #10054895

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2021  
**Filing Date:** 05/22/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
3RC/Sun Energy LLC [OL]  LOCATION: Pittsburgh, PA, US DESCRIPTION: Natural gas drilling		\$50,001 - \$100,000	None		<input type="checkbox"/>
Alice Joyce Ameritrade IRA ⇒ Ameritrade Brokerage Sweep Account [BA]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Alice Joyce Ameritrade IRA ⇒ Power Dividend Index Fund Class I - PWDIX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Alice Joyce Ameritrade IRA ⇒ Power Dividend Mid-Cap Index Fund Class I - DMCIX [MF]  DESCRIPTION: Fully exchanged for shares of Northern Lights TR Donoghue Forlines Dividend I (PWDIX)	SP	None	Tax-Deferred		<input type="checkbox"/>
Alice Joyce Ameritrade IRA ⇒ Power Floating Rate Index Fund Class I - FLOTX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Alice Joyce Ameritrade IRA ⇒ Power Global Tactical Allocation/JAForlines Fund Class I - GTAIX [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Alice Joyce Ameritrade IRA ⇒	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Power Income Fund Class I - PWRIX [MF]					
Alice Joyce Ameritrade IRA ⇒ Power Momentum Index Fund Classs I Shares - MOJOX [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Altoona Dermatology Associates LLC [OL]  LOCATION: Altoona, PA, US DESCRIPTION: Dermatology Practice	SP	\$250,001 - \$500,000	Dividends	\$100,001 - \$1,000,000	<input type="checkbox"/>
Bald Eagle Holding Company ⇒ Land [RP]  LOCATION: Tyrone, PA, US		\$15,001 - \$50,000	Dividends	None	<input type="checkbox"/>
Cabin Group, LLC ⇒ Residential Real Estate [RP]  LOCATION: Altoona, PA, US		\$100,001 - \$250,000	None		<input type="checkbox"/>
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	Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Invesco Pennsylvania Municipal Fund - OPATX [MF]		\$1,000,001 - \$5,000,000	Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Invesco Pennsylvania Municipal Fund - OPATX [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Logan Blvd Office [RP]  LOCATION: Altoona, PA, US	SP	\$250,001 - \$500,000	Rent	\$50,001 - \$100,000	<input type="checkbox"/>
M&T Bank Checking Account [BA]	JT	\$1,000,001 - \$5,000,000	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"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
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 ⇒ Allspring Intl Bond Instl CL [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Stifel Retirement Account - Alice ⇒ AMG SouthernSun US Equity I (SSEIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input 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 ⇒ JP Morgan Chase & Co Series Q Variable Note [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Nuveen High Yield Municipal Bond Fund (NHMRX) [MF]	SP	\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Stifel Retirement Account - Alice ⇒ Phaecian Accent Intl Value [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
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 [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Stifel Money Market Brokerage Sweep Account [BA]	SP	\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Transamerica Emerging Markets Debt I (EMTIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Wachovia Capital Tr III Income Variable Note [CS] DESCRIPTION: Corporate Bond	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Stifel Retirement Account - Alice ⇒ Wells Fargo International Bond Admin (ESICX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ AMG 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"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Stifel Retirement Account - Filer ⇒ Invesco Developing Markets [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ JP Morgan Chase & Co Series Q Variable Note [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
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 ⇒ Phaecian Accent Intl Value [MF]		\$15,001 - \$50,000	Tax-Deferred		<input 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] DESCRIPTION: Corporate bond		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Stifel Brokerage Sweep Account [BA]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Transamerica Emerging Markets Debt I (EMTIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Vanguard 500 Index Fund Admiral Shares - DFIAX [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Wachovia Cap Tr III Income TR Secs Variable Note [CS] DESCRIPTION: Corporate bond		None	Tax-Deferred		<input checked="" type="checkbox"/>
Stifel Retirement Account - Filer ⇒ Wells Fargo International Bond Admin (ESICX) [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"/>
Torray Fund - TORYX [MF]	SP	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard 500 Index Fund Admiral Shares - VFIAX [MF]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Vanguard Federal Money Market Sweep Account [BA]	SP	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard Federal Money Market Sweep Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard Pennsylvania Municipal Money Market [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard Pennsylvania Municipal Money Market Fund - VPTXX [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Vanguard U.S. Value Fund - VUVLX [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
White Oak Select Growth Fund [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<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?
Alice Joyce Ameritrade IRA ⇒ Power Dividend Mid-Cap Index Fund Class I (DMCIX) for Northern Lights Tr Donoghue Forlines Dividends I (PWDIX) [MF]  DESCRIPTION: Entirety DMCIX shares exchanged for PWDIX	SP	02/17/2021	E	\$1,001 - \$15,000	
Stifel Retirement Account - Alice ⇒ Allspring Intl Bond Instl CL [MF]	SP	06/2/2021	P	\$1,001 - \$15,000	
Stifel Retirement Account - Alice ⇒ Seagate HDD Cayman Sr Note CPN Due 1/1/25 [MF]	SP	01/4/2021	P	\$15,001 - \$50,000	
Wachovia Capital Tr III Income Variable Note [CS]  DESCRIPTION: Redeemed	SP	03/15/2021	S	\$50,001 - \$100,000	<input type="checkbox"/>
Wachovia Capital Tr III Income Variable Note [CS]		03/15/2021	S	\$50,001 -	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: Redeemed				\$100,000	

\* 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
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

None disclosed.

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

None disclosed.

### SCHEDULE A AND B ASSET CLASS DETAILS

- Alice Joyce Ameritrade IRA (Owner: SP)
- Bald Eagle Holding Company  
LOCATION: US
- 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 , 05/22/2023