



Filing ID #10051852

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Michael R. Turner  
**Status:** Member  
**State/District:** OH10

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 06/20/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA 9527 ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ First Trust Cloud Computing ETF (SKYY) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares Biotechnology ETF (IBB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares MBS ETF (MBB) [EF]					
IRA 9527 ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares MSCI Emerging Markets Min Vol Factor ETF (EEMV) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares U.S. Regional Banks ETF (IAT) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
IRA 9527 ⇒ Pacer Data & Infrastructure Real Estate ETF (SRVR) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
IRA 9527 ⇒ ProShares Online Retail ETF (ONLN) [EF]		None		Tax-Deferred	<input type="checkbox"/>
IRA 9527 ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR S&P Transportation ETF (XTN) [EF]		\$1 - \$1,000		Tax-Deferred	<input type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
IRA 9527 ⇒ VanEck Semiconductor ETF (SMH) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Industrials ETF (VIS) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [EF]		\$15,001 - \$50,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
DESCRIPTION: Tax deferred acct					
IRA 9527 ⇒ Vanguard Materials ETF (VAW) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Total International Bond ETF (BNDX) [EF]		\$1,001 - \$15,000		Tax-Deferred	<input checked="" type="checkbox"/>
ML Brokerage Account 3813 ⇒ Preferred Deposit Money Market Cusip 99861VDMo [MF]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Ohio State PERS [PE]		\$15,001 - \$50,000		Tax-Deferred	<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

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
IRA 9527 ⇒ BUPXX - Blackrock Liq Fund [MF]		07/12/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA 9527 ⇒ BUPXX Blackrock liq fund [MF]		10/11/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [EF]		05/11/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ First Trust Cloud Computing ETF (SKYY) [EF]		02/9/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ First Trust DJ Internet Index Fund (FDN) [EF]		02/2/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ First Trust DJ Internet Index Fund (FDN) [EF]		04/12/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		10/11/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		07/12/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		09/27/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF]		09/27/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [EF]		10/11/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares MBS ETF (MBB) [EF]		02/9/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares MBS ETF (MBB) [EF]		10/11/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF]		09/27/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares MSCI Emerging Markets Min Vol Factor ETF (EEMV) [EF]		09/27/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA 9527 ⇒ Real Estate Select Sector SPDR Fund (The) (XLRE) [EF]		05/11/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]		05/11/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]		10/11/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ SPDR Bloomberg 1-3 Month T-Bill ETF (BIL) [EF]		02/9/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		07/12/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		05/11/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		05/11/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ TSTXX - Blackrock Liq Fund [MF]		05/11/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ TSTXX Blackrock Liq fund [MF]		07/12/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ VanEck Semiconductor ETF (SMH) [EF]		02/9/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Vanguard Consumer Staples ETF (VDC) [EF]		07/12/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [EF]		04/12/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		07/12/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒		10/11/2022	P	\$1,001 - \$15,000	

<b>Asset</b>	<b>Owner</b>	<b>Date</b>	<b>Tx. Type</b>	<b>Amount</b>	<b>Cap. Gains &gt; \$200?</b>
Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]					
IRA 9527 ⇒ Vanguard Materials ETF (VAW) [EF]		07/12/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]		02/9/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]		05/11/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]		07/12/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Small-Cap ETF (VB) [EF]		02/9/2022	P	\$1,001 - \$15,000	
IRA 9527 ⇒ Vanguard Small-Cap ETF (VB) [EF]		05/11/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Small-Cap ETF (VB) [EF]		07/12/2022	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Total International Bond ETF (BNDX) [EF]		10/11/2022	P	\$1,001 - \$15,000	

\* 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**

None disclosed.

## **SCHEDULE D: LIABILITIES**

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
	Bank of America Home Loans	June 2020	DC Residence Mortgage	\$250,001 - \$500,000

## **SCHEDULE E: POSITIONS**

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 1994	Myself & the State of Ohio	Continued Participation in the Legislative Pension Plan

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
American Israel Education Foundation	06/27/2022	07/2/2022	Washington DC - Tel Aviv, Israel - Washington DC	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 ASSET CLASS DETAILS

- IRA 9527
- ML Brokerage Account 3813 (100% Interest)  
LOCATION: US  
DESCRIPTION: Money Market

## 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. Michael R. Turner , 06/20/2023