Filing ID #10052898

# Financial Disclosure Report

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## Filer Information

**Name:** Hon. Bill Johnson
**Status:** Member
**State/District:** OH06

## Filing Information

**Filing Type:** Annual Report
**Filing Year:** 2022
**Filing Date:** 05/15/2023

## Schedule A: Assets and "Unearned" Income

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Columbia Beneficial IRA ⇒ Columbia Balanced Fund [MF] | SP | $15,001 - $50,000 | Tax-Deferred | | ✓ |
| Columbia Funds Investment Account ⇒ Columbia Large Cap Value [MF] | DC | $15,001 - $50,000 | Capital Gains, Dividends | $2,501 - $5,000 | ✓ |
| Columbia Roth IRA ⇒ Columbia Balanced Fund [MF] | SP | $15,001 - $50,000 | Tax-Deferred | | |
| Columbia Traditional IRA ⇒ Columbia Balanced Fund [MF] | SP | $15,001 - $50,000 | Tax-Deferred | | ✓ |
| JP Morgan Chase Accounts [BA] | | $15,001 - $50,000 | Interest | $1 - $200 | |
| MAX Federal Credit Union Accounts [BA] | | $50,001 - $100,000 | Interest | $1 - $200 | |
| MetLife TCA Account [BA] | | $1,001 - $15,000 | Interest | $1 - $200 | |
| Non-IRA Brokerage Accounts ⇒ Ameriprise Sweep Account [BA] | SP | $1,001 - $15,000 | Interest | $1 - $200 | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Non-IRA Brokerage Accounts ⇒<br>Blackrock Inflation Protected Bond [MF] | SP | None | Dividends | $201 - $1,000 | ☑ |
| Non-IRA Brokerage Accounts ⇒<br>Clearbridge Int'l Growth [MF] | SP | None | Capital Gains, Dividends | $201 - $1,000 | ☑ |
| Non-IRA Brokerage Accounts ⇒<br>Clearbridge Mid Cap [MF] | SP | None | Dividends | None | ☑ |
| Non-IRA Brokerage Accounts ⇒<br>Columbia Select Mid Cap Value [MF] | SP | $1,001 - $15,000 | Dividends | None | ☑ |
| Non-IRA Brokerage Accounts ⇒<br>Delaware Floating Rate [MF] | SP | $1,001 - $15,000 | Dividends | None | ☑ |
| Non-IRA Brokerage Accounts ⇒<br>Eaton Vance Short Duration [MF] | SP | $15,001 - $50,000 | Dividends | $201 - $1,000 | ☑ |
| Non-IRA Brokerage Accounts ⇒<br>Fidelity Advisor Utilities [MF] | SP | $1,001 - $15,000 | Dividends | $1 - $200 | ☑ |
| Non-IRA Brokerage Accounts ⇒<br>IShares Core S&P 500 [EF] | SP | $15,001 - $50,000 | Capital Gains, Dividends | $1,001 - $2,500 | ☐ |
| Non-IRA Brokerage Accounts ⇒<br>JP Morgan Growth Advantage [MF] | SP | $1,001 - $15,000 | Dividends | None | ☐ |
| Non-IRA Brokerage Accounts ⇒<br>Lord Abbett Bond Debenture [MF] | SP | $1,001 - $15,000 | Capital Gains, Dividends | $201 - $1,000 | ☑ |
| Non-IRA Brokerage Accounts ⇒<br>Neuberger Berman Large Cap Value [MF] | SP | $15,001 - $50,000 | Dividends | $201 - $1,000 | ☐ |
| Non-IRA Brokerage Accounts ⇒<br>Thornburg Strategic Income [MF] | SP | $15,001 - $50,000 | Dividends | $201 - $1,000 | ☐ |
| Non-IRA Brokerage Accounts (Filer) ⇒<br>Clearbridge Int'l Growth [MF] | | None | Dividends | $1 - $200 | ☑ |
| Non-IRA Brokerage Accounts (Filer) ⇒<br>Eaton Vance Short Duration [MF] | | $1,001 - $15,000 | Dividends | $1 - $200 | ☑ |
| Non-IRA Brokerage Accounts (Filer) ⇒<br>Fidelity Advisor Utilities [MF] | | $1,001 - $15,000 | Dividends | $1 - $200 | ☑ |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Non-IRA Brokerage Accounts (Filer) ⇒ IShares Core S&P 500 [EF] | | $1,001 - $15,000 | Capital Gains, Dividends | $201 - $1,000 | ☐ |
| Non-IRA Brokerage Accounts (Filer) ⇒ JP Morgan Growth Advantage [MF] | | $1,001 - $15,000 | Dividends | None | ☐ |
| Non-IRA Brokerage Accounts (Filer) ⇒ Loomis Sayles Investment Grade Bond [MF] | | None | Dividends | $1 - $200 | ☑ |
| Non-IRA Brokerage Accounts (Filer) ⇒ Neuberger Berman Large Cap Value [MF] | | $1,001 - $15,000 | Dividends | $201 - $1,000 | ☐ |
| Non-IRA Brokerage Accounts (Filer) ⇒ Thornburg Strategic Income [MF] | | $1,001 - $15,000 | Dividends | $201 - $1,000 | ☐ |
| RiverSource Variable Universal Life Insurance ⇒ COL VP Intermediate Bond [MF] | SP | None | Tax-Deferred | | ☑ |
| RiverSource Variable Universal Life Insurance ⇒ Columbia VP Large Cap Index [MF] | SP | $1,001 - $15,000 | Tax-Deferred | | ☐ |
| RiverSource Variable Universal Life Insurance ⇒ CTIVP VicSyc EstVI [MF] | SP | $1,001 - $15,000 | Tax-Deferred | | ☑ |
| RiverSource Variable Universal Life Insurance ⇒ EV VT Floating Rate Inc [MF] | SP | $1,001 - $15,000 | Tax-Deferred | | ☑ |
| RiverSource Variable Universal Life Insurance ⇒ Invesco Oppenheimer Global Fund [MF] | SP | None | Tax-Deferred | | ☑ |
| Scholars Choice College Savings Plan [5P]<br>LOCATION: OH<br>DESCRIPTION: Age-Based Option: Age 16-18 Class A | | None | Tax-Deferred | | ☑ |
| SPS Traditional IRA ⇒ Ameriprise Insured Money Market [BA] | | $1,001 - $15,000 | Tax-Deferred | | ☐ |
| SPS Traditional IRA ⇒ Blackrock Inflation Protected Bond [MF] | | None | Tax-Deferred | | ☑ |
| SPS Traditional IRA ⇒ Clearbridge Int'l Growth [MF] | | None | Tax-Deferred | | ☑ |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| SPS Traditional IRA ⇒<br>Clearbridge Mid Cap [MF] | | None | Tax-Deferred | | ☑ |
| SPS Traditional IRA ⇒<br>Columbia Select Mid Cap Value [MF] | | $15,001 - $50,000 | Tax-Deferred | | ☑ |
| SPS Traditional IRA ⇒<br>Delaware Floating Rate [MF] | | $15,001 - $50,000 | Tax-Deferred | | ☑ |
| SPS Traditional IRA ⇒<br>Eaton Vance Short Duration [MF] | | $15,001 - $50,000 | Tax-Deferred | | ☑ |
| SPS Traditional IRA ⇒<br>Fidelity Advisor Utilities [MF] | | $15,001 - $50,000 | Tax-Deferred | | ☑ |
| SPS Traditional IRA ⇒<br>Goldman Sachs Small Cap Equity Insights [MF] | | None | Tax-Deferred | | ☑ |
| SPS Traditional IRA ⇒<br>Invesco Small Cap Value [MF] | | $1,001 - $15,000 | Tax-Deferred | | ☑ |
| SPS Traditional IRA ⇒<br>IShares Core S&P 500 [EF] | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| SPS Traditional IRA ⇒<br>JP Morgan Growth Advantage [MF] | | $1,001 - $15,000 | Tax-Deferred | | ☐ |
| SPS Traditional IRA ⇒<br>Loomis Sayles Investment Grade Bond [MF] | | None | Tax-Deferred | | ☑ |
| SPS Traditional IRA ⇒<br>Lord Abbett Bond Debenture Class A [MF] | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| SPS Traditional IRA ⇒<br>Neuberger Berman Large Cap Value [MF] | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| Stoneridge, Inc. (SRI) [ST] | | $100,001 - $250,000 | None | | ☐ |

* 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? |
|---|---|---|---|---|---|
| Columbia Beneficial IRA ⇒ Columbia Balanced Fund [MF] | SP | 12/9/2022 | P | $1,001 - $15,000 | |
| Columbia Funds Investment Account ⇒ Columbia Large Cap Value [MF] | DC | 12/14/2022 | P | $1,001 - $15,000 | |
| Columbia Funds Investment Account ⇒ Columbia Large Cap Value [MF] | DC | 12/13/2022 | S (partial) | $1,001 - $15,000 | ☑ |
| Columbia Traditional IRA ⇒ Columbia Balanced Fund [MF] | SP | 12/9/2022 | P | $1,001 - $15,000 | |
| Non-IRA Brokerage Accounts ⇒ Blackrock Inflation Protected Bond [MF] | SP | 11/29/2022 | S | $1,001 - $15,000 | ☐ |
| Non-IRA Brokerage Accounts ⇒ Clearbridge International Growth [MF] | SP | 04/12/2022 | S | $1,001 - $15,000 | ☐ |
| Non-IRA Brokerage Accounts ⇒ Clearbridge Mid Cap [MF] | SP | 11/29/2022 | S | $1,001 - $15,000 | ☐ |
| Non-IRA Brokerage Accounts ⇒ Columbia Select Mid Cap Value [MF] | SP | 11/29/2022 | P | $1,001 - $15,000 | |
| Non-IRA Brokerage Accounts ⇒ Delaware Floating Rate [MF] | SP | 11/29/2022 | P | $1,001 - $15,000 | |
| Non-IRA Brokerage Accounts ⇒ Eaton Vance Short Duration [MF] | SP | 06/7/2022 | P | $15,001 - $50,000 | |
| Non-IRA Brokerage Accounts ⇒ Fidelity Advisor Utilities [MF] | SP | 11/29/2022 | P | $1,001 - $15,000 | |
| Non-IRA Brokerage Accounts ⇒ Goldman Sachs International Equity [MF] | SP | 11/29/2022 | S | $1,001 - $15,000 | ☐ |
| Non-IRA Brokerage Accounts ⇒ Goldman Sachs International Equity [MF] | SP | 04/12/2022 | P | $1,001 - $15,000 | |
| Non-IRA Brokerage Accounts ⇒ | SP | 06/7/2022 | S | $1,001 - $15,000 | ☐ |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| Lord Abbett Bond Debenture [MF] | | | (partial) | | |
| Non-IRA Brokerage Accounts (Filer) ⇒ Clearbridge International Growth [MF] | | 04/12/2022 | S | $1,001 - $15,000 | ☐ |
| Non-IRA Brokerage Accounts (Filer) ⇒ Eaton Vance Short Duration [MF] | | 06/9/2022 | P | $1,001 - $15,000 | |
| Non-IRA Brokerage Accounts (Filer) ⇒ Fidelity Advisor Utilities [MF] | | 11/30/2022 | P | $1,001 - $15,000 | |
| Non-IRA Brokerage Accounts (Filer) ⇒ Goldman Sachs International Equity [MF] | | 11/30/2022 | S | $1,001 - $15,000 | ☐ |
| Non-IRA Brokerage Accounts (Filer) ⇒ Goldman Sachs International Equity [MF] | | 04/12/2022 | P | $1,001 - $15,000 | |
| Non-IRA Brokerage Accounts (Filer) ⇒ Loomis Sayles Investment Grade Bond [MF] | | 06/9/2022 | S | $1,001 - $15,000 | ☐ |
| RiverSource Variable Universal Life Insurance ⇒ COL VP Intermediate Bond [MF] | SP | 06/7/2022 | S | $1,001 - $15,000 | ☐ |
| RiverSource Variable Universal Life Insurance ⇒ CTIVP VicSyc EstVI [MF] | SP | 06/7/2022 | P | $1,001 - $15,000 | |
| RiverSource Variable Universal Life Insurance ⇒ EV VT Floating Rate Inc [MF] | SP | 11/29/2022 | P | $1,001 - $15,000 | |
| RiverSource Variable Universal Life Insurance ⇒ Invesco Oppenheimer Global Fund [MF] | SP | 06/7/2022 | S | $1,001 - $15,000 | ☐ |
| Scholars Choice Savings Plan [5P]<br><br>LOCATION: OH | | 08/3/2022 | S (partial) | $1,001 - $15,000 | ☐ |
| Scholars Choice Savings Plan [5P]<br><br>LOCATION: OH | | 12/13/2022 | S | $1,001 - $15,000 | ☐ |
| SPS Traditional IRA ⇒ Blackrock Inflation Protected Bond [MF] | | 11/30/2022 | S | $15,001 - $50,000 | ☐ |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| SPS Traditional IRA ⇒ Clearbridge International Growth [MF] | | 04/12/2022 | S | $15,001 - $50,000 | ☐ |
| SPS Traditional IRA ⇒ Clearbridge Mid Cap [MF] | | 11/30/2022 | S | $15,001 - $50,000 | ☐ |
| SPS Traditional IRA ⇒ Columbia Select Mid Cap Value [MF] | | 11/30/2022 | P | $15,001 - $50,000 | |
| SPS Traditional IRA ⇒ Delaware Floating Rate [MF] | | 11/30/2022 | P | $15,001 - $50,000 | |
| SPS Traditional IRA ⇒ Eaton Vance Short Duration [MF] | | 06/9/2022 | P | $15,001 - $50,000 | |
| SPS Traditional IRA ⇒ Fidelity Advisor Utilities [MF] | | 11/30/2022 | P | $15,001 - $50,000 | |
| SPS Traditional IRA ⇒ Goldman Sachs International Equity [MF] | | 11/30/2022 | S | $15,001 - $50,000 | ☐ |
| SPS Traditional IRA ⇒ Goldman Sachs International Equity [MF] | | 04/12/2022 | P | $15,001 - $50,000 | |
| SPS Traditional IRA ⇒ Goldman Sachs Small Cap Equity Insights [MF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| SPS Traditional IRA ⇒ Invesco Small Cap Value [MF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| SPS Traditional IRA ⇒ Loomis Sayles Investment Grade Bond [MF] | | 06/8/2022 | S | $15,001 - $50,000 | ☐ |

* 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 |
|---|---|---|
| Ameriprise Trust - Inherited IRA | IRA Distribution | N/A |
| Marietta Dental Works | Spouse Salary | N/A |

## Schedule D: Liabilities

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|---|---|---|---|---|
| | Mr. Cooper / Nationstar Mortgage | April 2016 | Mortgage on OH personal residence (not rented) | $100,001 - $250,000 |

## Schedule E: Positions

None disclosed.

## Schedule F: Agreements

None disclosed.

## Schedule G: Gifts

| Source | Description | Value |
|---|---|---|
| Marietta Country Club (Marietta, OH, US) | Prize winnings | $795.00 |

## Schedule H: Travel Payments and Reimbursements

| Trip Details | | | | | Inclusions | | |
|---|---|---|---|---|---|---|---|
| Source | Start Date | End Date | Itinerary | Days at Own Exp. | Lodging? | Food? | Family? |
| Consumer Technology Association (CTA) | 01/5/2022 | 01/7/2022 | Columbus, OH - Las Vegas, NV - Columbus, OH | 0 | ☑ | ☑ | ☐ |

## Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

## Schedule A and B Asset Class Details

- Columbia Beneficial IRA (Owner: SP)
- Columbia Funds Investment Account (Owner: DC)
  Location: US
- Columbia Roth IRA (Owner: SP)
- Columbia Traditional IRA (Owner: SP)
- Non-IRA Brokerage Accounts (Owner: SP)
  Location: US
- Non-IRA Brokerage Accounts (Filer)

Location: US

- RiverSource Variable Universal Life Insurance (Owner: SP)
- SPS Traditional IRA

## 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. Bill Johnson , 05/15/2023