Filing ID #10000516

# 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:** 2013
**Filing Date:** 05/13/2014

## Schedule A: Assets and "Unearned" Income

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Columbia Div Eq Inc | DC | $15,001 - $50,000 | Dividends | $201 - $1,000 | ☐ |
| Description: This is an investment account established for my son, Nathan, by his now-deceased grandfather. | | | | | |
| Columbia Funds Beneficial IRA - Columbia Balanced Fund | SP | $15,001 - $50,000 | Tax-Deferred | $201 - $1,000 | ☑ |
| Columbia Funds Beneficial IRA - Columbia Cap Alloc Moderate | SP | None | Tax-Deferred | None | ☑ |
| Columbia Funds Roth IRA - Columbia Balanced Fund | SP | $1,001 - $15,000 | Tax-Deferred | None | ☑ |
| Columbia Funds Roth IRA - Columbia Cap Alloc Moderate | SP | None | Tax-Deferred | None | ☑ |
| Columbia Funds Traditional IRA - Columbia Balanced Fund | SP | $15,001 - $50,000 | Tax-Deferred | None | ☑ |
| Columbial Funds Traditional IRA - Columbia Cap Alloc Moderate | SP | None | Tax-Deferred | None | ☑ |
| JP Morgan Chase - Personal Bank Account | JT | $1,001 - $15,000 | Interest | $1 - $200 | ☑ |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| MAX Federal Credit Union - Personal Bank Account | JT | $50,001 - $100,000 | Interest | $201 - $1,000 | ☑ |
| Non-IRA Brokerage - All/Bern Equity Inc | SP | $1,001 - $15,000 | Capital Gains, Dividends | $1,001 - $2,500 | ☐ |
| Non-IRA Brokerage - Eaton Vance Atl Cap Foc Gro | SP | None | Capital Gains | $5,001 - $15,000 | ☑ |
| Non-IRA Brokerage - Eaton Vance Fltg Rate | SP | $15,001 - $50,000 | Dividends | $201 - $1,000 | ☑ |
| Non-IRA Brokerage - Fidelity Adv Lev Co Stock | SP | $15,001 - $50,000 | Dividends | $1 - $200 | ☐ |
| Non-IRA Brokerage - Oppenheimer Equity Inc | SP | $15,001 - $50,000 | Capital Gains, Dividends | $1,001 - $2,500 | ☑ |
| Non-IRA Brokerage - Oppenheimer Global Strat Inc | SP | None | Dividends | $201 - $1,000 | ☑ |
| Non-IRA Columbia Funds - Columbia Balanced Fund | SP | $15,001 - $50,000 | Dividends | $201 - $1,000 | ☑ |
| Non-IRA Columbia Funds - Columbia Cap Alloc Moderate | SP | None | Capital Gains | $2,501 - $5,000 | ☑ |
| Non-IRA SPS Account - Columbia Contrarian Core | | $1,001 - $15,000 | Capital Gains, Dividends | $201 - $1,000 | ☑ |
| Non-IRA SPS Account - Eaton Vance Floating Rate | | $1,001 - $15,000 | Dividends | $1 - $200 | ☑ |
| Riversource Var Univ Life | SP | $1,001 - $15,000 | Tax-Deferred | None | ☐ |
| Stoneridge, Inc. (SRI) | | $50,001 - $100,000 | None | | ☐ |
| Traditional IRA SPS Account - Columbia Contranian Core | | $15,001 - $50,000 | Tax-Deferred | None | ☑ |
| Traditional IRA SPS Account - Eaton Vance Floating Rate | | $15,001 - $50,000 | Tax-Deferred | None | ☑ |
| Traditional IRA SPS Account - Invesco Comstock | | $15,001 - $50,000 | Tax-Deferred | None | ☑ |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Traditional IRA SPS Account - John Hancock Core HY Bond | | $15,001 - $50,000 | Tax-Deferred | None | ☑ |
| Traditional IRA SPS Account - John Hancock Disc MC | | $15,001 - $50,000 | Tax-Deferred | None | ☑ |
| Traditional IRA SPS Account - Legg Mason Glob Ops Bond | | $1,001 - $15,000 | Tax-Deferred | None | ☑ |
| Traditional IRA SPS Account - Pimco SC Stockplus | | $1,001 - $15,000 | Tax-Deferred | None | ☑ |

## Schedule B: Transactions

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| Beard IRA Account - Apache Corp Common Stock | | 09/16/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - CISCO Sys Common Stock | | 09/16/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - General Electric Common Stock | | 09/16/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - Emerging Mkts Debt | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - Enhanced Inc | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - Global Managed Vol | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - HY Bond | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - Large Cap | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - Multi-Asset Accum | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - Multi-Asset Cap Stab | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - Multi-Asset Infl | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| Beard IRA Account - SEI - Multi-Strategy Alt | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - Real Return | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - Short Duration Govt | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - US Fixed Inc | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard IRA Account - SEI - US Managed Volatility | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Beard Non-IRA Account - SEI - Global Managed Vol | | 09/12/2013 | S (partial) | $1,001 - $15,000 | ☐ |
| Columbia Funds Beneficial IRA - Columbia Balanced Fund | SP | 03/19/2013 | P | $15,001 - $50,000 | |
| Columbia Funds Beneficial IRA - Columbia Cap Alloc Moderate | SP | 03/19/2003 | S | $15,001 - $50,000 | ☐ |
| Columbia Funds Roth IRA - Columbia Balanced Fund | SP | 03/19/2013 | P | $1,001 - $15,000 | |
| Columbia Funds Roth IRA - Columbia Cap Alloc Moderate | SP | 03/19/2013 | S | $1,001 - $15,000 | ☐ |
| Columbia Funds Traditional IRA - Columbia Balanced Fund | SP | 03/19/2013 | P | $1,001 - $15,000 | |
| Columbia Funds Traditional IRA - Columbia Cap Alloc Moderate | SP | 03/19/2013 | S | $1,001 - $15,000 | ☐ |
| Non-IRA Brokerage - Eaton Vance Alt Cap Foc Gro | SP | 09/18/2013 | S | $15,001 - $50,000 | ☐ |
| Non-IRA Brokerage - Eaton Vance Floating Rate | SP | 09/18/2013 | P | $15,001 - $50,000 | |
| Non-IRA Brokerage - Oppenheimer Equity Inc | SP | 09/19/2013 | P | $15,001 - $50,000 | |
| Non-IRA Brokerage - Oppenheimer Glob Strat Inc | SP | 09/19/2013 | S | $15,001 - $50,000 | ☐ |
| Non-IRA Columbia Funds - Columbia Balanced Fund | SP | 03/19/2013 | P | $15,001 - $50,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| Non-IRA Columbia Funds - Columbia Cap Alloc Moderate | SP | 03/19/2013 | S | $15,001 - $50,000 | ☐ |
| Non-IRA SPS Account - Columbia Contrarian Core | | 09/24/2013 | P | $1,001 - $15,000 | |
| Non-IRA SPS Account - Eaton Vance Floating Rate | | 09/24/2013 | P | $1,001 - $15,000 | |
| Stoneridge Inc 401(k) Plan - American Funds Europacific | | 09/12/2013 | S | $1,001 - $15,000 | ☐ |
| Stoneridge Inc 401(k) Plan - Artisan Mid Cap Value | | 09/12/2013 | S | $15,001 - $50,000 | ☐ |
| Stoneridge Inc 401(k) Plan - Baron Small Cap | | 09/12/2013 | S | $15,001 - $50,000 | ☐ |
| Traditional IRA SPS Account - Columbia Contrarian Core | | 09/24/2013 | P | $15,001 - $50,000 | |
| Traditional IRA SPS Account - Eaton Vance Floating Rate | | 09/24/2013 | P | $15,001 - $50,000 | |
| Traditional IRA SPS Account - Invesco Comstock | | 09/24/2013 | P | $15,001 - $50,000 | |
| Traditional IRA SPS Account - John Hancock Core HY Bond | | 09/24/2013 | P | $15,001 - $50,000 | |
| Traditional IRA SPS Account - John Hancock Disc MC | | 09/24/2013 | P | $15,001 - $50,000 | |
| Traditional IRA SPS Account - Legg Mason Global Ops Bond | | 09/24/2013 | P | $1,001 - $15,000 | |
| Traditional IRA SPS Account - Pimco SC Stockplus | | 09/24/2013 | P | $1,001 - $15,000 | |

## Schedule C: Earned Income

None disclosed.

## 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.

## 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

## Comments

## 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 , 05/13/2014