Filing ID #10020757

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: 2017
Filing Date: 05/10/2018

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Congressional Federal Credit Union [BA]		$1,001 - $15,000	None		☐
IRA 9527 ⇒ First Trust Cloud Computing ETF (SKYY) [ST]		$1,001 - $15,000	Tax-Deferred		☑
IRA 9527 ⇒ First Trust DJ Internet Index Fund (FDN) [ST]		$1,001 - $15,000	Tax-Deferred		☑
IRA 9527 ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [ST]		$1,001 - $15,000	Tax-Deferred		☐
IRA 9527 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		$1,001 - $15,000	Tax-Deferred		☑
IRA 9527 ⇒ iShares iBoxx $ High Yield Corporate Bond ETF (HYG) [ST]		$1,001 - $15,000	Tax-Deferred		☐
IRA 9527 ⇒ iShares iBoxx $ Investment Grade Corporate Bond ETF (LQD) [ST]		$1,001 - $15,000	Tax-Deferred		☐
IRA 9527 ⇒		$1,001 - $15,000	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
iShares Inc iShares MSCI Switzerland ETF (EWL) [ST]					
IRA 9527 ⇒ iShares MBS ETF (MBB) [ST]		$1,001 - $15,000	Tax-Deferred		✓
IRA 9527 ⇒ iShares MSCI Canada Index Fund (EWC) [ST]		$1,001 - $15,000	Tax-Deferred		✓
IRA 9527 ⇒ iShares MSCI Eurozone ETF (EZU) [ST]		$1,001 - $15,000	Tax-Deferred		✓
IRA 9527 ⇒ iShares MSCI Japan Index Fund (EWJ) [ST]		$1,001 - $15,000	Tax-Deferred		✓
IRA 9527 ⇒ iShares MSCI Pacific Ex-Japan Index Fund (EPP) [ST]		$1,001 - $15,000	Tax-Deferred		✓
IRA 9527 ⇒ iShares MSCI United Kingdom ETF (EWU) [ST]		$1,001 - $15,000	Tax-Deferred		
IRA 9527 ⇒ iShares Nasdaq Biotechnology Index Fund (IBB) [ST]		$1,001 - $15,000	Tax-Deferred		✓
IRA 9527 ⇒ iShares TIPS Bond ETF (TIP) [ST]		$1,001 - $15,000	Tax-Deferred		
IRA 9527 ⇒ PowerShares Emerging Markets Sovereign Debt Portfolio (PCY) [ST]		$1,001 - $15,000	Tax-Deferred		
IRA 9527 ⇒ Real Estate Select Sector SPDR Fund (XLRE) [ST]		$1,001 - $15,000	Tax-Deferred		
IRA 9527 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]		$1,001 - $15,000	Tax-Deferred		✓
IRA 9527 ⇒ SPDR Select Sector Fund - Financial (XLF) [ST]		$1,001 - $15,000	Tax-Deferred		✓
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care (XLV) [ST]		$1,001 - $15,000	Tax-Deferred		✓
IRA 9527 ⇒ VanEck Vectors J.P. Morgan EM Local Currency Bond ETF		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
(EMLC) [ST]					
IRA 9527 ⇒ Vanguard Consumer Staples ETF (VDC) [ST]		$1,001 - $15,000	Tax-Deferred		☐
IRA 9527 ⇒ Vanguard Industrials ETF (VIS) [ST]		$1,001 - $15,000	Tax-Deferred		☑
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [ST]		$15,001 - $50,000	Tax-Deferred		☑
IRA 9527 ⇒ Vanguard Intermediate-Term Bond ETF (BIV) [ST]		$1,001 - $15,000	Tax-Deferred		☐
IRA 9527 ⇒ Vanguard Materials ETF (VAW) [ST]		$1,001 - $15,000	Tax-Deferred		☐
IRA 9527 ⇒ Vanguard Short-Term Bond ETF (BSV) [ST]		$1,001 - $15,000	Tax-Deferred		☑
Ohio State PERS [PE]		$15,001 - $50,000	Tax-Deferred		☐

* 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?
IRA 9527 ⇒ First Trust Cloud Computing ETF (SKYY) [ST]		09/25/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ First Trust DJ Internet Index Fund (FDN) [ST]		09/25/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		01/23/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [ST]		01/24/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ iShares iBoxx $ High Yield Corporate Bond ETF (HYG) [ST]		01/26/2017	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
IRA 9527 ⇒ iShares MBS ETF (MBB) [ST]		01/23/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ iShares MSCI Canada Index Fund (EWC) [ST]		01/23/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ iShares MSCI Eurozone ETF (EZU) [ST]		10/24/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ iShares MSCI Eurozone ETF (EZU) [ST]		12/5/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ iShares MSCI Japan Index Fund (EWJ) [ST]		01/23/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ iShares MSCI Pacific Ex-Japan Index Fund (EPP) [ST]		01/23/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ iShares MSCI United Kingdom ETF (EWU) [ST]		01/23/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ iShares Nasdaq Biotechnology Index Fund (IBB) [ST]		09/25/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]		01/23/2017	S (partial)	$1,001 - $15,000	☑
IRA 9527 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [ST]		09/25/2017	S (partial)	$1,001 - $15,000	☑
IRA 9527 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]		01/23/2017	S (partial)	$1,001 - $15,000	☑
IRA 9527 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]		07/18/2017	S (partial)	$1,001 - $15,000	☐
IRA 9527 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]		07/25/2017	S (partial)	$1,001 - $15,000	☐
IRA 9527 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [ST]		08/11/2017	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
IRA 9527 ⇒ SPDR Select Sector Fund - Financial (XLF) [ST]		02/21/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care (XLV) [ST]		08/11/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care (XLV) [ST]		09/25/2017	S (partial)	$1,001 - $15,000	☑
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care (XLV) [ST]		12/5/2017	S (partial)	$1,001 - $15,000	☐
IRA 9527 ⇒ Vanguard Industrials ETF (VIS) [ST]		01/23/2017	S (partial)	$1,001 - $15,000	☑
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [ST]		01/23/2017	S (partial)	$1,001 - $15,000	☑
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [ST]		05/17/2017	S (partial)	$1,001 - $15,000	☑
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [ST]		12/5/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ Vanguard Short-Term Bond ETF (BSV) [ST]		01/23/2017	P	$1,001 - $15,000	
IRA 9527 ⇒ WisdomTree Europe Hedged Equity Fund (HEDJ) [ST]		10/24/2017	S (partial)	$1,001 - $15,000	☐
IRA 9527 ⇒ WisdomTree Europe Hedged Equity Fund (HEDJ) [ST]		12/5/2017	S	$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

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Bank of America Merrill Lynch	October 2015	Mortgage on personal residence (not rented) Washington DC	$500,001 - $1,000,000
	Navient	November 2011	Student Loan	$15,001 - $50,000
	MasterCard	December 2017	Credit Card	$10,000 - $15,000

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

- IRA 9527

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

[x] 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 , 05/10/2018