Filing ID #10037409

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: 2019
Filing Date: 08/7/2020

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	$1,001 - $2,500	☑
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]		$1,001 - $15,000	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 ⇒ Clearbridge Large Cap Growth [MF]	SP	$15,001 - $50,000	Capital Gains, Dividends	$1,001 - $2,500	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Non-IRA Brokerage Accounts ⇒ Eaton Vance Floating Rate [MF]	SP	None	Dividends	$201 - $1,000	☑
Non-IRA Brokerage Accounts ⇒ Goldman Sachs Small Cap Equity Insights [MF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Non-IRA Brokerage Accounts ⇒ Goldman Sachs US Equity Insights [MF]	SP	None	Dividends	$1,001 - $2,500	☑
Non-IRA Brokerage Accounts ⇒ Invesco Oppenheimer Int'l Small and Mid Company [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	☐
Non-IRA Brokerage Accounts ⇒ IShares Core S&P 500 [EF]	SP	$15,001 - $50,000	Dividends	$201 - $1,000	☑
Non-IRA Brokerage Accounts ⇒ Ivy Mid Cap Income Opportunity [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☑
Non-IRA Brokerage Accounts ⇒ JP Morgan Large Cap Value [MF]	SP	None	Dividends	$1,001 - $2,500	☑
Non-IRA Brokerage Accounts ⇒ Lord Abbett Bond Debenture [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	☐
Non-IRA Brokerage Accounts ⇒ Neuberger Berman Large Cap Value [MF]	SP	$15,001 - $50,000	Dividends	$201 - $1,000	☑
Non-IRA Brokerage Accounts ⇒ Pimco Income [MF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Non-IRA Brokerage Accounts ⇒ Wells Fargo C&B Mid Cap Value [MF]	SP	None	Dividends	$201 - $1,000	☑
Non-IRA Brokerage Accounts ⇒ Western Asset Core Bond [MF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	☑
Non-IRA Brokerage Accounts (Filer) ⇒ Clearbridge Large Cap Growth Class A [MF]		$1,001 - $15,000	Capital Gains, Dividends	$1 - $200	☐
Non-IRA Brokerage Accounts (Filer) ⇒ Eaton Vance Floating Rate [MF]		None	Dividends	$1 - $200	☑
Non-IRA Brokerage Accounts (Filer) ⇒		None	Dividends	$201 - $1,000	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Goldman Sachs US Equity Insights [MF]					
Non-IRA Brokerage Accounts (Filer) ⇒ Invesco Oppenheimer Int'l Small-Mid Company [MF]		$1,001 - $15,000	Dividends	$201 - $1,000	☐
Non-IRA Brokerage Accounts (Filer) ⇒ IShares Core S&P 500 [EF]		$1,001 - $15,000	Dividends	$1 - $200	☑
Non-IRA Brokerage Accounts (Filer) ⇒ JP Morgan Large Cap Value [MF]		None	Dividends	$201 - $1,000	☑
Non-IRA Brokerage Accounts (Filer) ⇒ Neuberger Berman Large Cap Value [MF]		$1,001 - $15,000	Dividends	$1 - $200	☑
Non-IRA Brokerage Accounts (Filer) ⇒ Pimco Income Class A [MF]		$1,001 - $15,000	Dividends	$201 - $1,000	☐
Non-IRA Brokerage Accounts (Filer) ⇒ Western Asset Core Bond [MF]		$1,001 - $15,000	Dividends	$1 - $200	☑
RiverSource Variable Universal Life Insurance ⇒ COL VP Intermediate Bond [MF]	SP	$1,001 - $15,000	Tax-Deferred		☑
RiverSource Variable Universal Life Insurance ⇒ Columbia Large Cap Index [MF] Description: Asset now reportable due to increase in value.	SP	$1,001 - $15,000	Tax-Deferred		☐
RiverSource Variable Universal Life Insurance ⇒ Goldman VIT US Equity [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
RiverSource Variable Universal Life Insurance ⇒ Invesco Oppenheimer Global Fund [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Scholars Choice College Savings Plan [5P] Location: OH Description: Age-Based Option: Age 16-18 Class A		$1,001 - $15,000	Tax-Deferred		☐
SPS Traditional IRA ⇒ Ameriprise Insured Money Market [BA]		$1,001 - $15,000	Tax-Deferred		☐
SPS Traditional IRA ⇒ Clearbridge Large Cap Growth Class A [MF]		$15,001 - $50,000	Tax-Deferred		☑
SPS Traditional IRA ⇒		$1,001 - $15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Goldman Sachs Small Cap Equity Insights [MF]					
SPS Traditional IRA ⇒ Invesco Oppenheimer Int'l Small-Mid Company [MF]		$15,001 - $50,000	Tax-Deferred		☐
SPS Traditional IRA ⇒ IShares Core S&P 500 [EF]		$15,001 - $50,000	Tax-Deferred		☑
SPS Traditional IRA ⇒ Ivy Mid Cap Opportunity Fund [MF]		$15,001 - $50,000	Tax-Deferred		☑
SPS Traditional IRA ⇒ Lord Abbett Bond Debenture Class A [MF]		$15,001 - $50,000	Tax-Deferred		☐
SPS Traditional IRA ⇒ Neuberger Berman Large Cap Value [MF]		$15,001 - $50,000	Tax-Deferred		☑
SPS Traditional IRA ⇒ Western Asset Core Bond [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	07/16/2019	P	$15,001 - $50,000	
Columbia Beneficial IRA ⇒ Columbia Global Opportunities [MF]	SP	07/16/2019	S	$15,001 - $50,000	☐
Columbia Funds Investment Account ⇒ Columbia Large Cap Value [MF]	DC	12/16/2019	P	$1,001 - $15,000	
Columbia Roth IRA ⇒ Columbia Balanced Fund [MF]	SP	07/18/2019	P	$15,001 - $50,000	
Columbia Roth IRA ⇒ Columbia Global Opportunities [MF]	SP	07/18/2019	S	$15,001 - $50,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Columbia Traditional IRA ⇒ Columbia Balanced Fund [MF]	SP	07/18/2019	P	$15,001 - $50,000	
Columbia Traditional IRA ⇒ Columbia Global Opportunities [MF]	SP	07/18/2019	S	$15,001 - $50,000	☐
Non-IRA Brokerage Accounts ⇒ Clearbridge Large Cap Growth [MF]	SP	12/19/2019	P	$1,001 - $15,000	
Non-IRA Brokerage Accounts ⇒ Eaton Vance Floating Rate [MF]	SP	07/16/2019	S	$1,001 - $15,000	☐
Non-IRA Brokerage Accounts ⇒ Goldman Sachs US Equity Insights [MF]	SP	07/16/2019	S	$15,001 - $50,000	☐
Non-IRA Brokerage Accounts ⇒ IShares Core S&P 500 [EF]	SP	07/16/2019	P	$15,001 - $50,000	
Non-IRA Brokerage Accounts ⇒ Ivy Mid Cap Income Opportunity [MF]	SP	01/22/2019	P	$1,001 - $15,000	
Non-IRA Brokerage Accounts ⇒ JP Morgan Large Cap Value [MF]	SP	01/22/2019	S	$1,001 - $15,000	☐
Non-IRA Brokerage Accounts ⇒ Neuberger Berman Large Cap Value [MF]	SP	01/22/2019	P	$1,001 - $15,000	
Non-IRA Brokerage Accounts ⇒ Wells Fargo C&B Mid Cap Value [MF]	SP	01/22/2019	S	$1,001 - $15,000	☐
Non-IRA Brokerage Accounts ⇒ Western Asset Core Bond [MF]	SP	07/16/2019	P	$1,001 - $15,000	
Non-IRA Brokerage Accounts (Filer) ⇒ Eaton Vance Floating Rate Advantage [MF]		08/15/2019	S	$1,001 - $15,000	☐
Non-IRA Brokerage Accounts (Filer) ⇒ Goldman Sachs US Equity Insights [MF]		08/15/2019	S	$1,001 - $15,000	☐
Non-IRA Brokerage Accounts (Filer) ⇒ IShares S&P 500 [EF]		08/15/2019	P	$1,001 - $15,000	
Non-IRA Brokerage Accounts (Filer) ⇒		01/24/2019	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
JP Morgan Large Cap Value [MF]					
Non-IRA Brokerage Accounts (Filer) ⇒ Neuberger Berman Large Cap Value [MF]		01/24/2019	P	$1,001 - $15,000	
Non-IRA Brokerage Accounts (Filer) ⇒ Western Asset Core Bond [MF]		08/15/2019	P	$1,001 - $15,000	
RiverSource Variable Universal Life Insurance ⇒ COL VP Intermediate Bond [MF]	SP	07/16/2019	P	$1,001 - $15,000	
RiverSource Variable Universal Life Insurance ⇒ Eaton Vance Floating Rate [MF]	SP	07/16/2019	S	$1,001 - $15,000	☐
SPS Traditional IRA ⇒ Clearbridge Large Cap Growth [MF]		12/19/2019	P	$1,001 - $15,000	
SPS Traditional IRA ⇒ Eaton Vance Floating Rate [MF]		08/15/2019	S	$15,001 - $50,000	☐
SPS Traditional IRA ⇒ Goldman Sachs US Equity Insights [MF]		08/15/2019	S	$15,001 - $50,000	☐
SPS Traditional IRA ⇒ IShares Core S&P 500 [EF]		08/15/2019	P	$15,001 - $50,000	
SPS Traditional IRA ⇒ Ivy Mid Cap Income Opportunity [MF]		01/24/2019	P	$15,001 - $50,000	
SPS Traditional IRA ⇒ John Hancock Disciplined Val Mid Cap [MF]		01/24/2019	S	$15,001 - $50,000	☐
SPS Traditional IRA ⇒ JP Morgan Large Cap Value [MF]		01/24/2019	S	$15,001 - $50,000	☐
SPS Traditional IRA ⇒ Neuberger Berman Large Cap Value [MF]		01/24/2019	P	$15,001 - $50,000	
SPS Traditional IRA ⇒ Western Asset Core Bond [MF]		08/15/2019	P	$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 Company	IRA Distribution (to spouse)	$1,104.77

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
	USAA Federal Savings Bank	April 2016	Mortgage on OH personal residence (not rented)	$100,001 - $250,000

Schedule E: Positions

Position	Name of Organization
Board Member (Uncompensated)	Home in the Heart Foundation

Schedule F: Agreements

None disclosed.

Schedule G: Gifts

None disclosed.

Schedule H: Travel Payments and Reimbursements

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Ripon Society and The Franklin Center	08/4/2019	08/9/2019	Columbus, OH - Copenhagen, Denmark - 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 , 08/7/2020