



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. David B. McKinley  
**Status:** Member  
**State/District:** WV01

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2020  
**Filing Date:** 08/11/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Aarons Holdings Company, Inc. (AAN) [ST]	JT	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Abbott Laboratories (ABT) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Accenture plc Class A Ordinary Shares (ACN) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Activision Blizzard, Inc (ATVI) [ST]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Akamai Technologies, Inc. (AKAM) [ST]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Alphabet Inc. - Class A (GOOGL) [ST]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
American General Life Insurance [WU]	SP	\$1,001 - \$15,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Anthem, Inc. (ANTM) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Apple Inc. (AAPL) [ST]	JT	\$15,001 - \$50,000	Capital Gains,	\$50,001 -	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
			Dividends	\$100,000	
ARK Innovation (ARKK) [EF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Artisan Intl Value Fund Advisor APDKX [MF]	JT	None	None		<input checked="" type="checkbox"/>
AXA Equitable Life Insurance [WU]		\$1,001 - \$15,000	Dividends, Interest	\$201 - \$1,000	<input type="checkbox"/>
Becton, Dickinson and Company (BDX) [ST]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
BMO Intermediate Tax Free (MIITX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
CACI International, Inc. Class A (CACI) [ST]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Cerner Corporation (CERN) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Costco Wholesale Corporation (COST) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Dollar Tree, Inc. (DLTR) [ST]	JT	None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Ecolab Inc. (ECL) [ST]	JT	\$1 - \$1,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Estee Lauder Companies, Inc. (EL) [ST]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Government Cash Reserves [MF]	SP	\$1 - \$1,000	Dividends	\$.03	<input checked="" type="checkbox"/>
Fidelity Gov't Cash Reserve (FDRXX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
First Trust Biotech Area ETF. FBT [EF]	JT	None	Capital Gains	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fiserv, Inc. (FISV) [ST]	JT	\$50,001 - \$100,000	None		<input 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>
Global Payments Inc. (GPN) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Harding Loevner Inter (HLMIX) [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Hartford SMART529 Plan ⇒ SMART529 Hartford Growth Portfolio E [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Hartford SMART529 Plan ⇒ SMART529 Hartford Stable Value Fund E [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Home Depot, Inc. (HD) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Intuit Inc. (INTU) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Aarons Holdings Company, Inc. (AAN) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Abbott Laboratories (ABT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Activision Blizzard, Inc (ATVI) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Akamai Technologies, Inc. (AKAM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Anthem, Inc. (ANTM) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Apple Inc. (AAPL) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ARK Innovation (ARKK) [EF]		\$50,001 - \$100,000	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's ⇒ IRA- Spouse ⇒ Becton, Dickinson and Company (BDX) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Blackrock Total Return (MAHQX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ CACI International, Inc. Class A (CACI) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ CarMax Inc (KMX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Cerner Corporation (CERN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Costco Wholesale Corporation (COST) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Darden Restaurants, Inc. (DRI) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Dollar Tree, Inc. (DLTR) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Doubleline Total Return Bond Fd DBLTX [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Ecolab Inc. (ECL) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Estee Lauder Companies, Inc. (EL) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Fidelity Govt Cash Reserve (FDRXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Fiserv, Inc. (FISV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Global Payments Inc. (GPN) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Harding Loevner Intl Eq Port Inst HLMIX [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA's ⇒ IRA- Spouse ⇒ Home Depot, Inc. (HD) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Intuit Inc. (INTU) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Core S&P Small-Cap ETF (IJR) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [ST]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [ST]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Russell 1000 ETF (IWB) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Russell Midcap Growth ETF (IWP) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares U.S. Financial Services ETF (IYG) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares U.S. Treasury Bond ETF (GOVT) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Jacobs Engineering Group Inc. (J) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ JP Morgan Emerging Markets (JEMSX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Mastercard Incorporated (MA) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA's ⇒ IRA- Spouse ⇒ MFS International Growth Fund (MQGIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Microsoft Corporation (MSFT) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Netflix, Inc. (NFLX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ O'Reilly Automotive, Inc. (ORLY) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Primecap Odyssey (POAGX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ QUALCOMM Incorporated (QCOM) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Roper Technologies, Inc. (ROP) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ RPM International Inc. (RPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ S&P Global Inc. (SPGI) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Starbucks Corporation (SBUX) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Sysco Corporation (SYU) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Thermo Fisher Scientific Inc (TMO) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ TJX Companies, Inc. (TJX) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Tractor Supply Company (TSCO) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ United Technologies Corporation (UTX) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>

COMMENTS: United Technology merged with Raytheon Technologies in April 2020. Raytheon Tech reported separately in report.

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA's ⇒ IRA- Spouse ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard International Developed (VEA) [EF]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard International Growth (VWILX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Vanguard Russell Value (VONV) [EF]		\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Waste Management, Inc. (WM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ Doubleline Tot Return Bond FD CL DBLTX [MF]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ Fidelity Govt Cash Reserves (FDRXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ iShares 1-5 Year Investment Grade Corporate Bond ETF (IGSB) [ST]		\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ iShares 3-7 Year Treasury Bond ETF (IEI) [ST]		None	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [ST]		\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ iShares iBoxx \$ Investment Grade Corporate Bond ETF (LQD) [ST]		\$100,001 - \$250,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ iShares U.S. Treasury Bond ETF (GOVT) [ST]		\$250,001 - \$500,000	Tax-Deferred		<input checked="" type="checkbox"/>
iShares Broad USD High Yield Corporate Bond ETF (USHY) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input 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>
iShares Core MSCI EAFE ETF (IEFA) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
iShares Core MSCI EAFE ETF (IEFA) [ST]	JT	\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
iShares Core MSCI Emerging Markets ETF (IEMG) [ST]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
iShares Core MSCI Emerging Markets ETF (IEMG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
iShares Core S&P 500 ETF (IVV) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
iShares Core S&P Mid-Cap ETF (IJH) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares Core S&P Small-Cap ETF (IJR) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares Core S&P Small-Cap ETF (IJR) [ST]	JT	None	None		<input checked="" type="checkbox"/>
iShares J.P. Morgan USD Emerging Markets Bond ETF (EMB) [ST]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares MSCI USA Momentum Factor ETF (MTUM) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
iShares MSCI USA Quality Factor ETF (QUAL) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
iShares National Muni Bond ETF (MUB) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
iShares National Muni Bond ETF (MUB) [ST]	JT	\$250,001 - \$500,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
iShares Russell 1000 ETF (IWB) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
iShares Russell 2000 ETF (IWM) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
iShares Russell Midcap Growth ETF (IWP) [ST]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>



Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Short-Term National Muni Bond ETF (SUB) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
iShares U.S. Financial Services ETF (IYG) [ST]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Jacobs Engineering Group Inc. (J) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Main Street Checking Account [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Main Street Financial Services Corp (MSWV)TOD, 100% Interest [OT] DESCRIPTION: Gifted from Bennett G. McKinley, son (March 2020)	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Main Street Financial Services Corp (MSWV), 100% Interest [PS] DESCRIPTION: Dividends received	JT	\$250,001 - \$500,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Mastercard Incorporated (MA) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
McKinley Family Life Insurance Trust ⇒ Lincoln National Life Insurance [WU] DESCRIPTION: Represents policy value of assets held in irrevocable life insurance trust for the benefit of the filer's children upon the death of filer and spouse.	DC	\$100,001 - \$250,000	Dividends, Interest	\$2,501 - \$5,000	<input type="checkbox"/>
MFS International Growth (MQGIX) [MF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Microsoft Corporation (MSFT) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Nuveen SHRT Duration High Yld Muni Bond MVHIX [MF]	JT	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
O'Reilly Automotive, Inc. (ORLY) [ST]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Otis Worldwide Corporation (OTIS) [ST]	JT	None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
PrimeCap Odyssey POAGX [MF]	JT	None	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
QUALCOMM Incorporated (QCOM) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Raytheon Technologies Corporation (RTX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Real Estate Ownership and Partnerships ⇒ DEAB LLC rental Property ⇒ Real Estate Ownership and Partnership [RP]		\$1,000,001 - \$5,000,000	Dividends, Interest, Rent	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Wheeling/Ohio, WV, US DESCRIPTION: Net income from dividends and interest income. Rental net income was a loss in 2020.					
Real Estate Ownership and Partnerships ⇒ Preston County, WV Timberland ⇒ Real Estate Ownership and Partnerships [RP]		\$15,001 - \$50,000	timber sales	None	<input type="checkbox"/>
LOCATION: Preston/Preston County, WV, US DESCRIPTION: 90 acres of timber land co-owned by 5 others (siblings and extended family of spouse).					
Roper Technologies, Inc. (ROP) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
RPM International Inc. (RPM) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
S&P Global Inc. (SPGI) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Starbucks Corporation (SBUX) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Sysco Corporation (SYI) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Thermo Fisher Scientific Inc (TMO) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
TJX Companies, Inc. (TJX) [ST]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Tractor Supply Company (TSCO) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
United Technologies Corporation (UTX) [ST]	JT	None	None		<input checked="" type="checkbox"/>
COMMENTS: United Technology merged with Raytheon Technologies in April 2020. Raytheon Tech reported separately in report.					
UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Intermed Term Tax Exmpt VWITX [MF]	JT	None	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard International Equity Emerging (VWO) [EF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Vanguard Tax Managed International Dev Market (VEA) [EF]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Waste Management, Inc. (WM) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Wesbanco Checking [BA]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
WesBanco Savings [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" 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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Aarons Holdings Company, Inc. (AAN) [ST]	JT	03/23/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Accenture plc Class A Ordinary Shares (ACN) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Accenture plc Class A Ordinary Shares (ACN) [ST]	JT	01/2/2020	P	\$15,001 - \$50,000	
Activision Blizzard, Inc (ATVI) [ST]	JT	08/25/2020	P	\$15,001 - \$50,000	
Akamai Technologies, Inc. (AKAM) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Alphabet Inc. - Class A (GOOGL) [ST]	JT	03/23/2020	P	\$15,001 - \$50,000	
Alphabet Inc. - Class A (GOOGL) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Anthem, Inc. (ANTM) [ST]	JT	03/23/2020	P	\$15,001 - \$50,000	
Apple Inc. (AAPL) [ST]	JT	03/23/2020	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Apple Inc. (AAPL) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Apple Inc. (AAPL) [ST]	JT	08/28/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
ARK Innovation ETF (ARKK) [EF]	JT	04/30/2020	P	\$100,001 - \$250,000	
Artisan Intl Value Fund(APDKX) [EF]	JT	03/24/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
Becton, Dickinson and Company (BDX) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Becton, Dickinson and Company (BDX) [ST]	JT	08/25/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
BMO INTERMEDIATE TAX FREE INSTITUTIONAL [MF]	JT	08/25/2020	P	\$15,001 - \$50,000	
CACI International, Inc. Class A (CACI) [ST]	JT	03/23/2020	P	\$15,001 - \$50,000	
Carrier Global Corporation (CARR) [ST]	JT	04/3/2020	E	\$1,001 - \$15,000	
DESCRIPTION: United Technologies (UTX) completed a restructuring and had a spinoff of Carrier Global Corporation (CARR).					
Carrier Global Corporation (CARR) [ST]	JT	04/24/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
Cerner Corporation (CERN) [ST]	JT	10/5/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Costco Wholesale Corporation (COST) [ST]	JT	03/23/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Costco Wholesale Corporation (COST) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Dollar Tree, Inc. (DLTR) [ST]	JT	03/23/2020	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Ecolab Inc. (ECL) [ST]	JT	08/25/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Estee Lauder Companies, Inc. (EL) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Estee Lauder Companies, Inc. (EL) [ST]	JT	08/28/2020	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
				(partial)	
FIRST TR EXCHANGE TRADED FD NY ARCA BIOTECHNOLOGY INDEX FD [EF]	JT	03/23/2020	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Global Payments Inc. (GPN) [ST]	JT	05/26/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
HARDING LOEVNER INTL EQUITY PORT INSTL [MF]	JT	03/23/2020	P	\$1,001 - \$15,000	
HARDING LOEVNER INTL EQUITY PORT INSTL [MF]	JT	04/30/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
HARDING LOEVNER INTL EQUITY PORT INSTL [MF]	JT	08/25/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
HARDING LOEVNER INTL EQUITY PORT INSTL [MF]	JT	10/5/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Home Depot, Inc. (HD) [ST]	JT	08/28/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
I Shares Core S&P Small Cap [EF]	JT	01/2/2020	P	\$100,001 - \$250,000	
Intuit Inc. (INTU) [ST]	JT	08/28/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
IRA's ⇒ IRA- Filer ⇒ ARK ETF TR INNOVATION ETF [EF]		04/30/2020	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ Aarons Holdings Company, Inc. (AAN) [ST]		03/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Activision Blizzard, Inc (ATVI) [ST]		08/20/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Akamai Technologies, Inc. (AKAM) [ST]		04/30/2020	P	\$1,001 - \$15,000	

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA's ⇒ IRA- Spouse ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	03/9/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Anthem, Inc. (ANTM) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Anthem, Inc. (ANTM) [ST]	08/20/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Apple Inc. (AAPL) [ST]	03/9/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Apple Inc. (AAPL) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ ARK ETF TR INNOVATION ETF [EF]	06/1/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ARK ETF TR INNOVATION ETF [EF]	08/25/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Becton, Dickinson and Company (BDX) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Becton, Dickinson and Company (BDX) [ST]	08/20/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ BLACKROCK TOTAL RETURN INSTITUTIONAL [MF]	12/9/2020	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ CarMax Inc (KMX) [ST]	08/20/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Carrier Global Corporation (CARR) [ST]	04/3/2020	E	\$1,001 - \$15,000	
DESCRIPTION: United Technologies (UTX) completed a restructuring and had a spinoff of Carrier Global Corporation (CARR).				
IRA's ⇒ IRA- Spouse ⇒ Carrier Global Corporation (CARR) [ST]	04/13/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒	03/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
Costco Wholesale Corporation (COST) [ST]		(partial)		
IRA's ⇒ IRA- Spouse ⇒ Costco Wholesale Corporation (COST) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Darden Restaurants, Inc. (DRI) [ST]	03/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Dollar Tree, Inc. (DLTR) [ST]	03/9/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ DOUBLELINE TOTAL RETURN BOND FD CL I [MF]	03/17/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ DOUBLELINE TOTAL RETURN BOND FD CL I [MF]	06/1/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ DOUBLELINE TOTAL RETURN BOND FD CL I [MF]	12/9/2020	S	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Ecolab Inc. (ECL) [ST]	08/20/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Estee Lauder Companies, Inc. (EL) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Global Payments Inc. (GPN) [ST]	03/9/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Global Payments Inc. (GPN) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ HARDING LOEVNER INTL EQUITY PORT INSTL [MF]	10/26/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ISHARES CORE S&P SMALL-CAP E [EF]	03/17/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ISHARES CORE S&P SMALL-CAP E [EF]	04/30/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [ST]	01/2/2020	P	\$1,001 - \$15,000	

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA's ⇒ IRA- Spouse ⇒ ISHARES CORE US AGGREGATE BOND ETF [EF]	03/17/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ISHARES CORE US AGGREGATE BOND ETF [EF]	04/30/2020	P	\$50,001 - \$100,000	
IRA's ⇒ IRA- Spouse ⇒ ISHARES CORE US AGGREGATE BOND ETF [EF]	06/1/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ISHARES CORE US AGGREGATE BOND ETF [EF]	08/25/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ ISHARES IBOXX \$ INVESTMENT GRADE CORPORATE BOND ETF [EF]	06/1/2020	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ iShares Russell 1000 ETF (IWB) [ST]	01/2/2020	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ ISHARES RUSSELL 1000 INDEX FUND [EF]	04/30/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ISHARES RUSSELL 1000 INDEX FUND [EF]	12/16/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ISHARES TR ISHS 1-5YR INVS [EF]	06/1/2020	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ ISHARES TR RUS MD CP GR ETF [EF]	03/9/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ ISHARES TR US TREAS BD ETF [EF]	03/9/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ISHARES TR US TREAS BD ETF [EF]	03/17/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ ISHARES TR US TREAS BD ETF [EF]	06/1/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒	08/25/2020	P	\$1,001 - \$15,000	



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
ISHARES TR US TREAS BD ETF [EF]					
IRA's ⇒ IRA- Spouse ⇒ ISHARES TRUST DOW JONES UNITED STATES FINANCIAL [EF]		03/17/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ ISHARES TRUST DOW JONES UNITED STATES FINANCIAL [EF]		04/30/2020	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ iShares U.S. Treasury Bond ETF (GOVT) [ST]		01/2/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Jacobs Engineering Group Inc. (J) [ST]		04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ JPMORGAN EMERGING MKTS EQUITY CLASS I [MF]		10/26/2020	P	\$50,001 - \$100,000	
IRA's ⇒ IRA- Spouse ⇒ Mastercard Incorporated (MA) [ST]		04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ MFS INTERNATIONAL GROWTH FD CL I [MF]		03/9/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ MFS INTERNATIONAL GROWTH FD CL I [MF]		03/17/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ MFS INTERNATIONAL GROWTH FD CL I [MF]		04/30/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Microsoft Corporation (MSFT) [ST]		03/9/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Netflix, Inc. (NFLX) [ST]		08/20/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ O'Reilly Automotive, Inc. (ORLY) [ST]		04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Otis Worldwide Corporation (OTIS) [ST]		04/3/2020	E	\$1,001 - \$15,000	
DESCRIPTION: United Technologies (UTX) completed a restructuring and had a spinoff of OTIS Worldwide (OTIS).					

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA's ⇒ IRA- Spouse ⇒ Otis Worldwide Corporation (OTIS) [ST]	04/13/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ PRIMECAP ODYSSEY AGGRESSIVE GRWTH FD [MF]	04/30/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ QUALCOMM Incorporated (QCOM) [ST]	08/20/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Raytheon Technologies Corporation (RTX) [ST]  DESCRIPTION: United Technologies (UTX) completed a restructuring and changed its name to Raytheon Technologies (RTX).	04/3/2020	E	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Raytheon Technologies Corporation (RTX) [ST]	04/13/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Raytheon Technologies Corporation (RTX) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Raytheon Technologies Corporation (RTX) [ST]	08/20/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ Roper Technologies, Inc. (ROP) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ RPM International Inc. (RPM) [ST]	08/20/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ S&P GLOBAL INC COM [EF]	03/9/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ S&P Global Inc. (SPGI) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Starbucks Corporation (SBUX) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Sysco Corporation (SYY) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Sysco Corporation (SYY) [ST]	08/20/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒	04/30/2020	P	\$1,001 - \$15,000	

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
TJX Companies, Inc. (TJX) [ST]				
IRA's ⇒ IRA- Spouse ⇒ Tractor Supply Company (TSCO) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Tractor Supply Company (TSCO) [ST]	06/1/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [ST]	01/2/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ VANGUARD INTL EQUITY INDEX FDS FTSE EMR MKT ETF [EF]	03/9/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ VANGUARD INTL EQUITY INDEX FDS FTSE EMR MKT ETF [EF]	04/30/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ VANGUARD INTL EQUITY INDEX FDS FTSE EMR MKT ETF [EF]	10/26/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ IRA- Spouse ⇒ VANGUARD INTL GROWTH ADMIRAL [MF]	10/26/2020	P	\$50,001 - \$100,000	
IRA's ⇒ IRA- Spouse ⇒ VANGUARD SCOTTSDALE FDS VANGUARD RUSS1000 VALUE IDX FD ETF [EF]	12/16/2020	P	\$50,001 - \$100,000	
IRA's ⇒ IRA- Spouse ⇒ VANGUARD TAX-MANAGED INTL FD FTSE DEV MKT ETF [EF]	03/9/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ VANGUARD TAX-MANAGED INTL FD FTSE DEV MKT ETF [EF]	03/17/2020	P	\$15,001 - \$50,000	
IRA's ⇒ IRA- Spouse ⇒ VANGUARD TAX-MANAGED INTL FD FTSE DEV MKT ETF [EF]	06/1/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA's ⇒ IRA- Spouse ⇒ VANGUARD TAX-MANAGED INTL FD FTSE DEV MKT ETF [EF]		08/25/2020	P	\$1,001 - \$15,000	
IRA's ⇒ IRA- Spouse ⇒ Waste Management, Inc. (WM) [ST]		04/30/2020	P	\$1,001 - \$15,000	
IRA's ⇒ Rollover IRA ⇒ DOUBLELINE TOTAL RETURN BOND FD CL I [MF]		03/23/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ DOUBLELINE TOTAL RETURN BOND FD CL I [MF]		10/5/2020	S (partial)	\$100,001 - \$250,000	<input type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ DOUBLELINE TOTAL RETURN BOND FD CL I [MF]		12/9/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ ISHARES CORE US AGGREGATE BOND ETF [EF]		03/23/2020	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ ISHARES CORE US AGGREGATE BOND ETF [EF]		04/30/2020	P	\$100,001 - \$250,000	
IRA's ⇒ Rollover IRA ⇒ ISHARES IBOXX \$ INVESTMENT GRADE CORPORATE BOND ETF [EF]		10/5/2020	P	\$100,001 - \$250,000	
IRA's ⇒ Rollover IRA ⇒ ISHARES INC CORE MSCI EMERGING MKTS ETF [EF]		03/23/2020	P	\$15,001 - \$50,000	
IRA's ⇒ Rollover IRA ⇒ ISHARES INC CORE MSCI EMERGING MKTS ETF [EF]		04/30/2020	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ ISHARES RUSSELL 1000 INDEX FUND [EF]		03/23/2020	P	\$50,001 - \$100,000	
IRA's ⇒ Rollover IRA ⇒ ISHARES RUSSELL 1000 INDEX FUND [EF]		04/30/2020	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ ISHARES TR 3 7 YR TREAS BD [EF]		02/21/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ ISHARES TR 3 7 YR TREAS BD [EF]		03/23/2020	S	\$250,001 - \$500,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA's ⇒ Rollover IRA ⇒ ISHARES TR ISHS 1-5YR INVS [EF]		10/5/2020	P	\$250,001 - \$500,000	
IRA's ⇒ Rollover IRA ⇒ ISHARES TR ISHS 1-5YR INVS [EF]		12/29/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ ISHARES TR RUS MD CP GR ETF [EF]		03/23/2020	P	\$15,001 - \$50,000	
IRA's ⇒ Rollover IRA ⇒ ISHARES TR RUS MD CP GR ETF [EF]		04/30/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ ISHARES TR US TREAS BD ETF [EF]		03/23/2020	P	\$500,001 - \$1,000,000	
IRA's ⇒ Rollover IRA ⇒ ISHARES TR US TREAS BD ETF [EF]		08/25/2020	P	\$1,001 - \$15,000	
IRA's ⇒ Rollover IRA ⇒ ISHARES TR US TREAS BD ETF [EF]		10/5/2020	S (partial)	\$250,001 - \$500,000	<input type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ ISHARES TR US TREAS BD ETF [EF]		12/9/2020	P	\$100,001 - \$250,000	
IRA's ⇒ Rollover IRA ⇒ ISHARES TRUST CORE MSCI EAFE ETF [EF]		03/23/2020	P	\$50,001 - \$100,000	
IRA's ⇒ Rollover IRA ⇒ ISHARES TRUST CORE MSCI EAFE ETF [EF]		04/30/2020	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
IRA's ⇒ Rollover IRA ⇒ MFS INTERNATIONAL GROWTH FD CL I [MF]		03/23/2020	P	\$1,001 - \$15,000	
IRA's ⇒ Rollover IRA ⇒ MFS INTERNATIONAL GROWTH FD CL I [MF]		10/5/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
ISHARES CORE S&P SMALL-CAP E [EF]	JT	03/23/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>
ISHARES INC CORE MSCI EMERGING MKTS ETF [EF]	SP	09/14/2020	P	\$1,001 - \$15,000	
ISHARES INC CORE MSCI EMERGING MKTS ETF [EF]	JT	03/23/2020	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares MSCI USA Momentum Factor ETF (MTUM) [ST]	JT	03/23/2020	P	\$15,001 - \$50,000	
iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	JT	08/25/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
iShares MSCI USA Momentum Factor ETF (MTUM) [EF]	JT	08/28/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
ISHARES NATIONAL MUNI BOND ETF [EF]	SP	09/14/2020	P	\$1,001 - \$15,000	
ISHARES NATIONAL MUNI BOND ETF [EF]	JT	04/30/2020	P	\$250,001 - \$500,000	
ISHARES RUSSELL 1000 INDEX FUND [EF]	JT	03/23/2020	P	\$15,001 - \$50,000	
ISHARES RUSSELL 1000 INDEX FUND [EF]	JT	04/30/2020	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
ISHARES RUSSELL 1000 INDEX FUND [EF]	JT	08/25/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
ISHARES RUSSELL 1000 INDEX FUND [EF]	JT	08/28/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
ISHARES RUSSELL 2000 ETF [EF]	JT	03/23/2020	P	\$100,001 - \$250,000	
ISHARES RUSSELL 2000 ETF [EF]	JT	04/30/2020	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
ISHARES S&P 500 [EF]	SP	09/14/2020	P	\$1,001 - \$15,000	
ISHARES SHORT-TERM NATIONAL MUNI BOND ETF [EF]	SP	09/14/2020	P	\$1,001 - \$15,000	
ISHARES TR MSCI USA MMENTM [EF]	JT	03/23/2020	P	\$15,001 - \$50,000	
ISHARES TR MSCI USA MMENTM [EF]	JT	04/30/2020	P	\$15,001 - \$50,000	
ISHARES TR RUS MD CP GR ETF [EF]	JT	03/23/2020	P	\$100,001 - \$250,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
ISHARES TR RUS MD CP GR ETF [EF]	JT	04/30/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
ISHARES TRUST CORE MSCI EAFE ETF [EF]	SP	09/14/2020	P	\$1,001 - \$15,000	
ISHARES TRUST CORE MSCI EAFE ETF [EF]	JT	03/23/2020	P	\$250,001 - \$500,000	
ISHARES TRUST DOW JONES UNITED STATES FINANCIAL [EF]	JT	03/23/2020	P	\$15,001 - \$50,000	
ISHARES TRUST DOW JONES UNITED STATES FINANCIAL [EF]	JT	04/30/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Jacobs Engineering Group Inc. (J) [ST]	JT	04/30/2020	P	\$15,001 - \$50,000	
Mastercard Incorporated (MA) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Mastercard Incorporated (MA) [ST]	JT	08/28/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
MFS INTERNATIONAL GROWTH FD CL I [MF]	JT	03/23/2020	P	\$100,001 - \$250,000	
Microsoft Corporation (MSFT) [ST]	JT	05/26/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Microsoft Corporation (MSFT) [ST]	JT	08/28/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
NUVEEN SHRT DURATION HIGH YLD MUNI BOND I [MF]	JT	05/26/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
O'Reilly Automotive, Inc. (ORLY) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Otis Worldwide Corporation (OTIS) [ST]	JT	04/3/2020	E	\$1,001 - \$15,000	
DESCRIPTION: United Technologies (UTX) completed a restructuring and had a spinoff of OTIS Worldwide (OTIS).					
Otis Worldwide Corporation (OTIS) [ST]	JT	04/24/2020	S	\$1,001 - \$15,000	<input type="checkbox"/>
PRIMECAP ODYSSEY AGGRESSIVE GRWTH FD [MF]	JT	03/23/2020	S	\$100,001 - \$250,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
QUALCOMM Incorporated (QCOM) [ST]	JT	08/25/2020	P	\$15,001 - \$50,000	
Raytheon Technologies Corporation (RTX) [ST]	JT	03/23/2020	P	\$1,001 - \$15,000	
Raytheon Technologies Corporation (RTX) [ST]	JT	04/3/2020	E	\$15,001 - \$50,000	
DESCRIPTION: United Technologies (UTX) completed a restructuring and changed its name to Raytheon Technologies (RTX).					
Raytheon Technologies Corporation (RTX) [ST]	JT	04/24/2020	P	\$1,001 - \$15,000	
Raytheon Technologies Corporation (RTX) [ST]	JT	08/25/2020	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
RPM International Inc. (RPM) [ST]	JT	08/25/2020	P	\$15,001 - \$50,000	
S&P Global Inc. (SPGI) [ST]	JT	03/23/2020	P	\$1,001 - \$15,000	
S&P Global Inc. (SPGI) [ST]	JT	04/30/2020	P	\$15,001 - \$50,000	
Starbucks Corporation (SBUX) [ST]	JT	03/23/2020	P	\$1,001 - \$15,000	
Starbucks Corporation (SBUX) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Sysco Corporation (SYY) [ST]	JT	03/23/2020	P	\$15,001 - \$50,000	
Thermo Fisher Scientific Inc (TMO) [ST]	JT	03/23/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Thermo Fisher Scientific Inc (TMO) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Thermo Fisher Scientific Inc (TMO) [ST]	JT	10/5/2020	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
TJX Companies, Inc. (TJX) [ST]	JT	03/23/2020	P	\$15,001 - \$50,000	
Tractor Supply Company (TSCO) [ST]	JT	03/3/2020	P	\$15,001 - \$50,000	
Tractor Supply Company (TSCO) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
United Technologies Corporation (UTX) [ST]	JT	03/23/2020	P	\$1,001 - \$15,000	



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	03/23/2020	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Vanguard FTSE Emerging Markets ETF (VWO) [EF]	JT	04/30/2020	P	\$15,001 - \$50,000	
VANGUARD INTERMED TERM TAX EXEMPT INV [MF]	JT	04/30/2020	S (partial)	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
VANGUARD INTL EQUITY INDEX FDS FTSE EMR MKT ETF [EF]	JT	03/23/2020	S	\$50,001 - \$100,000	<input type="checkbox"/>
VANGUARD TAX-MANAGED INTL FD FTSE DEV MKT ETF [EF]	JT	03/23/2020	S	\$250,001 - \$500,000	<input type="checkbox"/>
VANGUARD TAX-MANAGED INTL FD FTSE DEV MKT ETF [EF]	JT	04/30/2020	P	\$50,001 - \$100,000	
Waste Management, Inc. (WM) [ST]	JT	03/23/2020	P	\$1,001 - \$15,000	
Waste Management, Inc. (WM) [ST]	JT	04/30/2020	P	\$1,001 - \$15,000	
Waste Management, Inc. (WM) [ST]	JT	08/28/2020	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Waste Management, Inc. (WM) [ST]	JT	01/2/2020	P	\$15,001 - \$50,000	
WesBanco Savings, 50% Interest [BA]	SP	09/11/2020	E	\$15,001 - \$50,000	
DESCRIPTION: Critical Connections has been dormant and has not had transactions in numerous years. Business was dissolved on December 16, 2020. Balance in savings account was transferred to spouse's individual account at Fidelity. It was previously reported under the spouse's WesBanco savings account.					

\* 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

None disclosed.

### SCHEDULE E: POSITIONS

Position	Name of Organization
Member	Maxwell Centre, LLC
Member	DEAB LLC, DEAB II LLC
Board Member - Emeritus	West Virginia Independence Hall Foundation

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

Source	Description	Value
Bennett G. McKinley (son) (Wheeling, WV, US)	Main Street Financial Services Corp	\$34,000.00

## 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

- Hartford SMART529 Plan  
LOCATION: WV
- IRA's
- IRA's ⇒ IRA- Filer
- IRA's ⇒ IRA- Spouse  
DESCRIPTION: Traditional Financial Investments in SEP, IRA, Rollover IRA and Filer-owned are primarily managed by a third party Registered Investment Advisory manager who has discretion for trades.
- IRA's ⇒ Rollover IRA  
DESCRIPTION: McKinley & Associates 401K plan rolled into this account Aug 2013. Traditional Financial Investments in Jt, SP, IRA, Rollover IRA and Filer-owned are primarily managed by a third party Registered Investment Advisory manager who has discretion for trades.
- McKinley Family Life Insurance Trust (100% Interest) (Owner: DC)  
DESCRIPTION: Irrevocable Life Insurance Trust established by Filer and Spouse for the benefit of their children once both the Filer and Spouse have deceased. Asset disclosed is the Policy Value (Including Cash Surrender Value) of the policies.
- Real Estate Ownership and Partnerships  
LOCATION: WV, US
- Real Estate Ownership and Partnerships ⇒ DEAB LLC rental Property (66% Interest)  
LOCATION: Wheeling, WV, US  
DESCRIPTION: Amount represents Filer's portion
- Real Estate Ownership and Partnerships ⇒ Preston County, WV Timberland (16% Interest)

LOCATION: Preston, WV, US

DESCRIPTION: 90 acres Co-owned with 5 others( siblings and extended family)

### **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. David B. McKinley , 08/11/2021