



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. John Joyce
Status: Member
State/District: PA13

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? |
|---|-------|----------------------|--------------------------|---------------------|--------------------------|
| 3RC/Phoenix Investment, LLC [OL] LOCATION: Pittsburgh, PA, US DESCRIPTION: Physical therapy clinics | | None | Capital Gains, Dividends | \$15,001 - \$50,000 | <input type="checkbox"/> |
| 3RC/Sun Energy LLC [OL] LOCATION: Pittsburgh, PA, US DESCRIPTION: Natural gas drilling | | \$50,001 - \$100,000 | Capital Gains, Interest | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Alice Joyce Ameritrade IRA ⇒ Ameritrade Brokerage Sweep Account [BA] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Alice Joyce Ameritrade IRA ⇒ Power Dividend Index Fund Class I - PWDIX [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Alice Joyce Ameritrade IRA ⇒ Power Dividend Mid-Cap Index Fund Class I - DMCIX [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Alice Joyce Ameritrade IRA ⇒ Power Floating Rate Index Fund Class I - FLOTX [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|-------|-------------------------------|----------------|----------------------------|--------------------------|
| Alice Joyce Ameritrade IRA ⇒ Power Global Tactical Allocation/JAForlines Fund Class I - GTAIX [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Alice Joyce Ameritrade IRA ⇒ Power Income Fund Class I - PWRIX [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Alice Joyce Ameritrade IRA ⇒ Power Momentum Index Fund Class I Shares - MOJOX [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Altoona Dermatology Associates LLC [OL] LOCATION: Altoona, PA, US DESCRIPTION: Dermatology Practice | SP | \$250,001 - \$500,000 | Dividends | \$100,001 - \$1,000,000 | <input type="checkbox"/> |
| Bald Eagle Holding Company ⇒ Land [RP] LOCATION: Tyrone, PA, US | | \$15,001 - \$50,000 | Dividends | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Cabin Group, LLC ⇒ Residential Real Estate [RP] LOCATION: Altoona, PA, US | | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| Chester County Pennsylvania Health Ed Facilities Revenue Bond [GS] | SP | \$50,001 - \$100,000 | Interest | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Chester County Pennsylvania Health Ed Facilities Revenue Bond [GS] | | \$100,001 - \$250,000 | Interest | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Invesco Pennsylvania Municipal Fund - OPATX [MF] | SP | Spouse/DC Over \$1,000,000 | Dividends | \$50,001 - \$100,000 | <input type="checkbox"/> |
| Invesco Pennsylvania Municipal Fund - OPATX [MF] | | \$1,000,001 - \$5,000,000 | Dividends | \$50,001 - \$100,000 | <input type="checkbox"/> |
| Invesco Pennsylvania Tax Free Income Fund - VKMPX [MF] | JT | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Logan Blvd Office [RP] LOCATION: Altoona, PA, US | SP | \$250,001 - \$500,000 | Rent | \$50,001 - \$100,000 | <input type="checkbox"/> |
| M&T Bank Checking Account [BA] | JT | \$500,001 - \$1,000,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|----------------------------|--------------------------|----------------------|-------------------------------------|
| M&T Bank Savings Account [BA] | JT | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Mairs & Power Growth Fund - MPGFX [MF] | SP | \$500,001 - \$1,000,000 | Capital Gains, Dividends | \$15,001 - \$50,000 | <input type="checkbox"/> |
| Nuveen High Yield Muni Bond Fund - NHMAX [MF] | | \$1,000,001 - \$5,000,000 | Dividends | \$50,001 - \$100,000 | <input type="checkbox"/> |
| Nuveen High Yield Muni Bond Fund - NHMAX [MF] | SP | Spouse/DC Over \$1,000,000 | Dividends | \$50,001 - \$100,000 | <input type="checkbox"/> |
| Pennsylvania State Higher Ed Facility Auth Revenue Bond [GS] | | \$100,001 - \$250,000 | Interest | \$5,001 - \$15,000 | <input type="checkbox"/> |
| Pennsylvania State Higher Ed Health System Revenue Bond [GS] | SP | None | Interest | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Pittsburgh and Allegheny County Excise Tax Bond [GS] | SP | None | Interest | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ AMG SouthernSun US Equity I (SSEIX) [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Artisan International Value Advisor (APDKX) [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Artisan Value Advisor (APDLX) [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Citigroup Inc Dep Shs Repstg Perpetual [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Citigroup Inc Variable Note [CS] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Corporate bond | | | | | |
| Stifel Retirement Account - Alice ⇒ Diamond Hill Small Cap I (DHSIX) [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ General Electric Capital Corp. Note [CS] | SP | None | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Corporate bond | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|---|--------------|-----------------------|-----------------------|---------------|-------------------------------------|
| Stifel Retirement Account - Alice ⇒ Harding Loevner International Eq Instl (HLMIX) [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Invesco Developing Markets Cl Y [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ JP Morgan Chase & Co Series Q Variable Note [MF] | SP | \$50,001 - \$100,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Nuveen High Yield Municipal Bond Fund (NHMRX) [MF] | SP | \$250,001 - \$500,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Pennymac Corp Senior Convertible Note [CS] DESCRIPTION: Corporate bond | SP | None | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Phaecian Accent Intl Value [MF] | SP | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ RiverPark/Wedgewood Institutional (RWGIX) [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ RR Donnelly & Sons Co. Note [CS] DESCRIPTION: Corporate bond | SP | None | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Seagate HDD Senior Note [CS] DESCRIPTION: Corporate bond | SP | None | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Stifel Money Market Brokerage Sweep Account [BA] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Transamerica Emerging Markets Debt I (EMTIX) [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Wachovia Capital Tr III Income Variable Note [CS] DESCRIPTION: Corporate Bond | SP | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Alice ⇒ Wells Fargo International Bond Admin (ESICX) [MF] | SP | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-------------------------|----------------|--------|-------------------------------------|
| Stifel Retirement Account - Filer ⇒ AMG SouthernSun US Equity I (SSEIX) [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Artisan International Value Advisor (APDKX) [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Artisan Value Advisor (APDLX) [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Citigroup Inc Dep Shs Repstg [MF] | | \$100,001 - \$250,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Citigroup Inc Note [CS] DESCRIPTION: Corporate bond | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Diamond Hill Small Cap I (DHSIX) [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ General Electric Capital Corp. Medium Term Note [CS] DESCRIPTION: Corporate bond | | None | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Harding Loevner International Eq Instl (HLMIX) [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Invesco Developing Markets [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ JP Morgan Chase & Co Series Q Variable Note [MF] | | \$100,001 - \$250,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Nuveen High Yield Municipal Bond Fund (NHMRX) [MF] | | \$500,001 - \$1,000,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Pennymac Corp Senior Convertible Note [CS] DESCRIPTION: Corporate bond | | None | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Phaecian Accent Intl Value [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input checked="" type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|----------------|-------------------|--------------------------|
| Stifel Retirement Account - Filer ⇒ RiverPark/Wedgewood Institutional (RWGIX) [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ RR Donnelly & Sons Co Note [CS] | | None | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Corporate bond | | | | | |
| Stifel Retirement Account - Filer ⇒ Seagate HDD Senior Note [CS] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Corporate bond | | | | | |
| Stifel Retirement Account - Filer ⇒ Stifel Brokerage Sweep Account [BA] | | \$15,001 - \$50,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Transamerica Emerging Markets Debt I (EMTIX) [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Vanguard 500 Index Fund Admiral Shares - DFIAX [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ Wachovia Cap Tr III Income TR Secs Variable Note [CS] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| DESCRIPTION: Corporate bond | | | | | |
| Stifel Retirement Account - Filer ⇒ Wells Fargo International Bond Admin (ESICX) [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | <input type="checkbox"/> |
| Stifel Retirement Account - Filer ⇒ White Oak Select Growth Fund - WOGSX [MF] | | \$50,001 - \$100,000 | Tax-Deferred | | <input type="checkbox"/> |
| Torrey Fund - TORYX [MF] | SP | \$100,001 - \$250,000 | Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Vanguard 500 Index Fund Admiral Shares - VFIAX [MF] | | \$100,001 - \$250,000 | Dividends | \$2,501 - \$5,000 | <input type="checkbox"/> |
| Vanguard Brokerage Sweep Money Market [BA] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Vanguard Federal Money Market Sweep Account [BA] | SP | \$100,001 - \$250,000 | Interest | \$1,001 - \$2,500 | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|--------------------------|--------------------|--------------------------|
| Vanguard Pennsylvania Municipal Money Market [BA] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Vanguard Pennsylvania Municipal Money Market Fund - VPTXX [BA] | SP | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| Vanguard U.S. Value Fund - VUVLX [MF] | | \$250,001 - \$500,000 | Capital Gains, Dividends | \$5,001 - \$15,000 | <input type="checkbox"/> |
| White Oak Select Growth Fund [MF] | | \$100,001 - \$250,000 | Capital Gains, Dividends | \$2,501 - \$5,000 | <input 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? |
|--|-------|------------|----------|-----------------------|---------------------|
| Stifel Retirement Account - Alice ⇒ Citigroup Inc Dep Shs Repstg Perpetual [MF] | SP | 09/18/2020 | P | \$15,001 - \$50,000 | |
| Stifel Retirement Account - Alice ⇒ JP Morgan Chase & Co Series Q Variable Note [MF] | SP | 09/18/2020 | P | \$15,001 - \$50,000 | |
| Stifel Retirement Account - Filer ⇒ Citigroup Inc Dep Shs Repstg Perpetual [MF] | | 09/18/2020 | P | \$100,001 - \$250,000 | |
| Stifel Retirement Account - Filer ⇒ JP Morgan Chase & Co Series Q Variable Note [MF] | | 09/18/2020 | P | \$100,001 - \$250,000 | |

* 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 |
|--------------------------------|---------------|--------|
| Altoona Dermatology Associates | Spouse salary | N/A |

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.

SCHEDULE A AND B ASSET CLASS DETAILS

- Alice Joyce Ameritrade IRA (Owner: SP)
- Bald Eagle Holding Company
LOCATION: US
- Cabin Group, LLC
LOCATION: US
- Stifel Retirement Account - Alice (Owner: SP)
- Stifel Retirement Account - Filer

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. John Joyce , 08/11/2021