Filing ID #10042321

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: 2020
Filing Date: 08/13/2021

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	$50,001 - $100,000	Tax-Deferred		☑
Columbia Funds Investment Account ⇒ Columbia Large Cap Value [MF]	DC	$15,001 - $50,000	Capital Gains, Dividends	$201 - $1,000	☐
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]		$100,001 - $250,000	Interest	$1 - $200	☐
MetLife TCA Account [BA]		$1,001 - $15,000	Interest	$1 - $200	☐
Non-IRA Brokerage Accounts ⇒ Ameriprise Sweep Account [BA]	SP	$1,001 - $15,000	Interest	$1 - $200	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Non-IRA Brokerage Accounts ⇒ Clearbridge Int'l Growth [MF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	☑
Non-IRA Brokerage Accounts ⇒ Clearbridge Large Cap Growth [MF]	SP	None	Capital Gains, Dividends	$5,001 - $15,000	☑
Non-IRA Brokerage Accounts ⇒ Goldman Sachs Small Cap Equity Insights [MF]	SP	$1,001 - $15,000	Dividends	$1 - $200	☐
Non-IRA Brokerage Accounts ⇒ Invesco Oppenheimer Int'l Small and Mid Company [MF]	SP	None	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 ⇒ Lord Abbett Bond Debenture [MF]	SP	$1,001 - $15,000	Capital Gains, Dividends	$201 - $1,000	☐
Non-IRA Brokerage Accounts ⇒ MFS Growth Fund [MF]	SP	$15,001 - $50,000	Dividends	$1,001 - $2,500	☑
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 ⇒ Western Asset Core Bond [MF]	SP	$1,001 - $15,000	Dividends	$201 - $1,000	☐
Non-IRA Brokerage Accounts (Filer) ⇒ Clearbridge Int'l Growth [MF]		$1,001 - $15,000	Dividends	$1 - $200	☑
Non-IRA Brokerage Accounts (Filer) ⇒ Clearbridge Large Cap Growth Class A [MF]		None	Capital Gains, Dividends	$1,001 - $2,500	☑
Non-IRA Brokerage Accounts (Filer) ⇒ Invesco Oppenheimer Int'l Small-Mid Company [MF]		None	Capital Gains, Dividends	$1 - $200	☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $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) ⇒ MFS Growth Fund [MF]		$1,001 - $15,000	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]	SP	$1,001 - $15,000	Tax-Deferred		☑
RiverSource Variable Universal Life Insurance ⇒ Goldman VIT US Equity [MF]	SP	None	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 Int'l Growth [MF]		$15,001 - $50,000	Tax-Deferred		☑
SPS Traditional IRA ⇒ Clearbridge Large Cap Growth Class A [MF]		None	Tax-Deferred		☑
SPS Traditional IRA ⇒ Goldman Sachs Small Cap Equity Insights [MF]		$15,001 - $50,000	Tax-Deferred		☐
SPS Traditional IRA ⇒		None	Tax-Deferred		☑

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Invesco Oppenheimer Int'l Small-Mid Company [MF]					
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 ⇒ MFS Growth Fund [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	12/9/2020	P	$1,001 - $15,000	
Columbia Traditional IRA ⇒ Columbia Balanced Fund [MF]	SP	12/9/2020	P	$1,001 - $15,000	
Non-IRA Brokerage Accounts ⇒ Clearbridge Int'l Growth [MF]	SP	07/21/2020	P	$1,001 - $15,000	
Non-IRA Brokerage Accounts ⇒ Clearbridge Large Cap Growth [MF]	SP	01/14/2020	S	$15,001 - $50,000	☑
Non-IRA Brokerage Accounts ⇒	SP	07/21/2020	S	$1,001 - $15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
Invesco Oppenheimer Int'l Small-Mid Company [MF]					
Non-IRA Brokerage Accounts ⇒ MFS Growth Fund [MF]	SP	12/16/2020	P	$1,001 - $15,000	
Non-IRA Brokerage Accounts ⇒ MFS Growth Fund [MF]	SP	01/14/2020	P	$15,001 - $50,000	
Non-IRA Brokerage Accounts (Filer) ⇒ Clearbridge Int'l Growth [MF]		07/28/2020	P	$1,001 - $15,000	
Non-IRA Brokerage Accounts (Filer) ⇒ Clearbridge Large Cap Growth [MF]		01/17/2020	S	$1,001 - $15,000	☑
Non-IRA Brokerage Accounts (Filer) ⇒ Invesco Oppenheimer Int'l Small-Mid Company [MF]		07/28/2020	S	$1,001 - $15,000	☐
Non-IRA Brokerage Accounts (Filer) ⇒ MFS Growth Fund [MF]		01/17/2020	P	$1,001 - $15,000	
RiverSource Variable Universal Life Insurance ⇒ Columbia Large Cap Index [MF]	SP	01/14/2020	P	$1,001 - $15,000	
RiverSource Variable Universal Life Insurance ⇒ Goldman VIT US Equity [MF]	SP	01/14/2020	S	$1,001 - $15,000	☐
SPS Traditional IRA ⇒ Clearbridge Int'l Growth [MF]		07/28/2020	P	$15,001 - $50,000	
SPS Traditional IRA ⇒ Clearbridge Large Cap Growth [MF]		01/17/2020	S	$15,001 - $50,000	☐
SPS Traditional IRA ⇒ Invesco Oppenheimer Int'l Small-Mid Company [MF]		07/28/2020	S	$15,001 - $50,000	☐
SPS Traditional IRA ⇒ Lord Abbett Bond Debenture [MF]		07/28/2020	S (partial)	$1,001 - $15,000	☐
SPS Traditional IRA ⇒ MFS Growth Fund [MF]		12/16/2020	P	$1,001 - $15,000	
SPS Traditional IRA ⇒ MFS Growth Fund [MF]		01/17/2020	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

None disclosed.

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

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

- 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 , 08/13/2021