



Filing ID #10047420

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Max Miller
Status: Congressional Candidate
State/District: OH07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2022
Filing Date: 05/6/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
1437 Rhode Island Ave. NW [RP] LOCATION: Washington , DC, US		\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
1907 Wynwood Drive [RP] LOCATION: Rocky River, OH, US		\$1,000,001 - \$5,000,000	None		
1989 Trust ⇒ Baillie Gifford Long Term Global Growth (BSGLX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
1989 Trust ⇒ Blackstone Mortgage Trust, Inc. (BXMT) [ST]		\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
1989 Trust ⇒ Brookfield Asset Management Inc. (BAM) [ST]		\$250,001 - \$500,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
1989 Trust ⇒ Brookfield Property Partners L.P. - 6.25% Class A Cumulative Redeemable Preferred Units, Series 1 (BPYPM) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$15,001 - \$50,000	\$100,001 - \$1,000,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
1989 Trust ⇒ Fidelity Mid Cap Index Fund (FSMDX) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
1989 Trust ⇒ Fidelity Treasury Money Market Fund (FZFX) [MF]		\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
1989 Trust ⇒ iAngels - Immunai [HE]		\$100,001 - \$250,000	None		
1989 Trust ⇒ iShares MSCI Emerging Markets Ex China (EMXC) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
1989 Trust ⇒ Mondrian Global Equity Value Fund (MPGVX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
1989 Trust ⇒ Nationwide International Small Cap (NWXVX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
1989 Trust ⇒ Natixis Gateway Y (GTEYX) [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
1989 Trust ⇒ Ninety One Global Franchise (ZGFIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
1989 Trust ⇒ Promissory Note Receivable - Max Miller [OT]		\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Promissory Note Receivable to Max Miller; Listed as liability to Max Miller personally					
1989 Trust ⇒ Prudential High-Yield Z [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
1989 Trust ⇒ Prudential Total Return Bond Z (PDBZX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
1989 Trust ⇒ The Merger Fund CL I (MERIX) [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$201 - \$1,000
1989 Trust ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2009 Trust ⇒ Fidelity Mid Cap Index Fund (FSMDX) [BA]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
2009 Trust ⇒ Fidelity Treasury Money Market Fund (FZFX) [BA]		\$500,001 - \$1,000,000	Dividends	\$1 - \$200	\$1 - \$200
2009 Trust ⇒ iShares MSCI Emerging Markets Ex China (EMXC) [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
2009 Trust ⇒ Mondrian Global Equity Value Fund (MPGV) [BA]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
2009 Trust ⇒ Nationwide International Small Cap (NWXV) [BA]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2009 Trust ⇒ Natixis Gateway Y (GTEY) [BA]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
2009 Trust ⇒ Ninety One Global Franchise (ZGFI) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2009 Trust ⇒ Prudential High-Yield Z [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2009 Trust ⇒ Prudential Total Return Bond Z (PDBZ) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2009 Trust ⇒ The Merger Fund CL I (MERI) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2009 Trust ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2012 Trust ⇒ Baillie Gifford Long Term Global Growth (BSGL) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2012 Trust ⇒ Fidelity Mid Cap Index Fund (FSMD) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2012 Trust ⇒ Fidelity Treasury Money Market Fund (FZFX) [MF]		\$1,000,001 - \$5,000,000	Dividends	\$5,001 - \$15,000	\$201 - \$1,000
2012 Trust ⇒ iShares MSCI Emerging Markets Ex China (EMXC) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2012 Trust ⇒		\$15,001 - \$50,000	Dividends	\$201 -	\$201 -

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Mondrian Global Equity Value Fund (MPGVX) [MF]				\$1,000	\$1,000
2012 Trust ⇒ Nationwide International Small Cap (NWXVX) [MF]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
2012 Trust ⇒ Natixis Gateway Y (GTEYX) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2012 Trust ⇒ Ninety One Global Franchise (ZGFIX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2012 Trust ⇒ Prudential High-Yield Z [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2012 Trust ⇒ Prudential Total Return Bond Z (PDBZX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2012 Trust ⇒ The Merger Fund CL I (MERIX) [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
2012 Trust ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
PNC Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Baillie Gifford Long Term Global Growth (BSGLX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Fidelity Treasury Money Market Fund (FZFXX) [BA]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Revocable Trust ⇒ Fidelity Treasury Money Market Fund (FZFXX) [MF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Revocable Trust ⇒ iShares MSCI Emerging Markets Ex China (EMXC) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Mondrian Global Equity Value Fund (MPGVX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Revocable Trust ⇒ Nationwide International Small Cap (NWXVX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Natixis Gateway Y (GTEYX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Revocable Trust ⇒ Ninety One Global Franchise (ZGFIX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Prudential High-Yield Z [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ Prudential Total Return Bond Z (PDBZX) [MF]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Revocable Trust ⇒ The Merger Fund CL I (MERIX) [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Revocable Trust ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Roth IRA ⇒ Ninety One Global Franchise (ZGFIX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable
Roth IRA ⇒ Schwab Total Stock Market Index (SWTSX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	Not Applicable

* 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
	BNY Mellon	June 2019	Mortgage	\$250,001 - \$500,000
	Ruth R. Miller 1989 Grandchildren's Trust	September 2021	Loan	\$250,001 - \$500,000

PNC Bank

March 2022

Mortgage

\$500,001 -
\$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- 1989 Trust
- 2009 Trust
- 2012 Trust
- Revocable Trust
- Roth IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Max Miller , 05/6/2022