Filing ID #10050889

# Financial Disclosure Report

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## Filer Information

**Name:** Hon. Michael F. Doyle
**Status:** Former Member
**State/District:** PA18

## Filing Information

**Filing Type:** Terminated Filer Report
**Filing Year:** 2023
**Filing Date:** 02/15/2023

## Schedule A: Assets and "Unearned" Income

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| 1916 Monongahela Avenue [RP]<br>Location: Pittsburgh, PA, US | | $100,001 - $250,000 | Rent | $15,001 - $50,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒<br>AB Small Cap Growth Advisor [EF] | | $1,001 - $15,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒<br>Allspring Special Mid Cap Value Instl [EF] | | $1,001 - $15,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒<br>Blackrock Mid Cap Growth Equity Instl [EF] | | $1,001 - $15,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒<br>Calvert Core Bond CL [EF] | | $15,001 - $50,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒<br>Columbia Dividend Income Instl CL [EF] | | $1,001 - $15,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒<br>Edgewood Growth Instl CL [EF] | | $1,001 - $15,000 | Tax-Deferred | | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ | | $1,001 - $15,000 | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Fidelity Advisor High Income Adv CL [EF] | | | | | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Hartford Schroders Intl Stock CL [EF] | | $1,001 - $15,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Invesco Corp Bond [EF] | | $1,001 - $15,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ JP Morgan US Equity CL [EF] | | $15,001 - $50,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ PIMCO INCOME CL I2 [EF] | | $1,001 - $15,000 | Tax-Deferred | | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Putnam Global Tech CL [EF] | | $1,001 - $15,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Putnam Large Cap Value CL [EF] | | $1,001 - $15,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Royce Small Cap Oppty Inv CL [EF] | | $1,001 - $15,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ USAA NASDAQ 100 INDEX [EF] | | $1,001 - $15,000 | Tax-Deferred | | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Wasatch Emerging Markets Small Cap [EF] | | $1,001 - $15,000 | Tax-Deferred | | ✓ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Western Asset Core Bond CL [EF] | | $15,001 - $50,000 | Tax-Deferred | | ✓ |
| SERS [PE] | | Undetermined | Pension Distribution | $5,001 - $15,000 | |
| Social Security [PE] | JT | Undetermined | Pension Distribution | $15,001 - $50,000 | |
| Strategic Asset Management II ⇒ AB HIGH YIELD ADVISOR CL [EF] | JT | $1,001 - $15,000 | Capital Gains, Dividends | $1 - $200 | |
| Strategic Asset Management II ⇒ ALGER SMALL CAP FOCUS CL Z [EF] | JT | $1,001 - $15,000 | Capital Gains | $1 - $200 | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
| --- | --- | --- | --- | --- | --- |
| Strategic Asset Management II ⇒ BUFFALO DISCOVERY [EF] | JT | $1,001 - $15,000 | Dividends | $1 - $200 | ☐ |
| Strategic Asset Management II ⇒ Carillon Scout Mid Cap Cl I [EF] | JT | $1,001 - $15,000 | None | | ☐ |
| Strategic Asset Management II ⇒ COLUMBIA DIVIDEND INCOME INSTL CL [EF] | JT | $1,001 - $15,000 | None | | ☐ |
| Strategic Asset Management II ⇒ Edgewood Growth Instl CL [EF] | JT | $1,001 - $15,000 | Capital Gains, Dividends | $201 - $1,000 | ☐ |
| Strategic Asset Management II ⇒ MFS EMERGING MARKETS DEBT CL I [EF] | JT | $1,001 - $15,000 | Dividends | $1 - $200 | ☐ |
| Strategic Asset Management II ⇒ MORGAN STANLEY INSTL GLOBAL FRANCHISE CL I [EF] | JT | $1,001 - $15,000 | Capital Gains | $1 - $200 | ☐ |
| Strategic Asset Management II ⇒ PIMCO INCOME CL I2 [EF] | JT | $1,001 - $15,000 | None | | ☐ |
| Strategic Asset Management II ⇒ PUTNAM GLOBAL TECH CL Y [EF] | JT | $1,001 - $15,000 | None | | ☐ |
| Strategic Asset Management II ⇒ PUTNAM LARGE CAP VALUE CL Y [EF] | JT | $1,001 - $15,000 | None | | ☐ |
| Strategic Asset Management II ⇒ T ROWE PRICE COM & TECH INV CL [EF] | JT | $1,001 - $15,000 | Capital Gains | $1 - $200 | ☐ |
| Strategic Asset Management II ⇒ USAA NASDAQ 100 INDEX [EF] | JT | $1,001 - $15,000 | Capital Gains, Dividends | $1,001 - $2,500 | ☑ |
| Strategic Asset Management II ⇒ VIRTUS KAR SMALL CAP GROWTH CL I [EF] | JT | $1,001 - $15,000 | Capital Gains | $1 - $200 | ☐ |
| Strategic Asset Management II ⇒ WASATCH HOISINGTON US TREAS INV CL [EF] | JT | $1,001 - $15,000 | None | | ☐ |
| Structured Capital Strategies ⇒ Choice Russel 2000 5Yr - 15% Buffer [EF] | | $50,001 - $100,000 | Tax-Deferred | | ☐ |
| Structured Capital Strategies ⇒ | | $100,001 - | Tax-Deferred | | ☐ |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Choice S&P 500 5Yr - 10% Buffer [EF] | | $250,000 | | | |
| Structured Capital Strategies ⇒ Choice S&P 500 5Yr - 15% Buffer [EF] | | $50,001 - $100,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ MSCI EAFE 5 YEAR - 10% BUFFER [EF] | | $100,001 - $250,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ MSCI EAFE 6 YEAR - 10% BUFFER [EF] | | $1,001 - $15,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ MSCI EAFE 6 YEAR - 20% BUFFER [EF] | | $15,001 - $50,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ MSCI EAFE ETF 6 Yr - 10% Buffer [EF] | | $1,001 - $15,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ MSCI EAFE ETF 6 Yr - 20% Buffer [EF] | | $15,001 - $50,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ MSCI EAFE ETF Ann Lock 6 Yr - 10% Buffer [EF] | | $1,001 - $15,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ MSCI EAFE ETF Annual Lock 5Yr [EF] | | $15,001 - $50,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ MSCI EAFE ETF Annual Lock 6Yr [EF] | | $1,001 - $15,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ Russell 2000 6 Yr - 10% Buffer [EF] | | $1,001 - $15,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ Russell 2000 6 Yr - 20% Buffer [EF] | | $15,001 - $50,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ Russell 2000 6Yr - 10% Buffer [EF] | | $15,001 - $50,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ Russell 2000 6Yr - 20% Buffer [EF] | | $15,001 - $50,000 | Tax-Deferred | | |
| Structured Capital Strategies ⇒ Russell 2000 Ann Lock 6 Yr - 10% Buffer [EF] | | $15,001 - $50,000 | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > $1,000? |
|---|---|---|---|---|---|
| Structured Capital Strategies ⇒ Russell 2000 Annual Lock 5Yr - 10% [EF] | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| Structured Capital Strategies ⇒ Russell 2000 Annual Lock 6Yr - 10% [EF] | | $1,001 - $15,000 | Tax-Deferred | | ☐ |
| Structured Capital Strategies ⇒ S&P 500 6 Yr - 10% Buffer [EF] | | $1,001 - $15,000 | Tax-Deferred | | ☐ |
| Structured Capital Strategies ⇒ S&P 500 6 Yr - 20% Buffer [EF] | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| Structured Capital Strategies ⇒ S&P 500 6Yr - 10% Buffer [EF] | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| Structured Capital Strategies ⇒ S&P 500 6Yr - 20% Buffer [EF] | | $50,001 - $100,000 | Tax-Deferred | | ☐ |
| Structured Capital Strategies ⇒ S&P 500 Ann Lock 6 Yr - 10% Buffer [EF] | | $1,001 - $15,000 | Tax-Deferred | | ☐ |
| Structured Capital Strategies ⇒ S&P 500 Annual Lock 5Yr - 10% Buffer [EF] | | $15,001 - $50,000 | Tax-Deferred | | ☐ |
| Structured Capital Strategies ⇒ S&P 500 Annual Lock 6Yr - 10% [EF] | | $15,001 - $50,000 | Tax-Deferred | | ☐ |

* 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? |
|---|---|---|---|---|---|
| Retirement Acct. Strategic Asset Mngt. II ⇒ AB Small Cap Growth Advisor [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Alger Small Cap Focus CL Z [EF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Allspring Special Mid Cap Value Instl [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| Retirement Acct. Strategic Asset Mngt. II ⇒ Blackrock Mid Cap Growth Equity Instl [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Buffalo Discovery [EF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Calvert Core Bond CL [EF] | | 06/8/2022 | P | $15,001 - $50,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Carillon Scout Mid Cap CL [EF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Columbia Dividend Income Instl CL [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Delaware Healthcare Instl CL [EF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Eaton Vance Floating Rate Advntg CL [EF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Fidelity Advisor High Income Adv CL [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Fidelity Inflation Protected Bond Index [EF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ First Eagle High Income CL [EF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Hartford Schroders Intl Stock CL [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Invesco Corp Bond [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Invesco Global Opptys CL Y [EF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ JP Morgan US Equity CL [EF] | | 06/8/2022 | P | $15,001 - $50,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
|---|---|---|---|---|---|
| MFS Emerging Markets Debt CL [EF] | | | | | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Morgan Stanley Instl Global Franchise CL [EF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Pimco Income CL [EF] | | 06/8/2022 | S | $15,001 - $50,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Pimco Low Duration Income CL 12 [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Prime Cap Odyssey [EF] | | 06/8/2022 | S | $15,001 - $50,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Putnam Global Tech CL [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Putnam Large Cap Value CL [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Royce Oppty Investment CL [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ T Rowe Price Comm & Tech Investor CL [EF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ USAA Nasdaq 100 Index [EF] | | 06/8/2022 | S | $1,001 - $15,000 | ☐ |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Wasatch Emerging Markets Small Cap [EF] | | 06/8/2022 | P | $1,001 - $15,000 | |
| Retirement Acct. Strategic Asset Mngt. II ⇒ Western Asset Core Bond CL [EF] | | 06/8/2022 | P | $15,001 - $50,000 | |
| Strategic Asset Management II ⇒ Pimco Income CL [EF] | JT | 01/19/2022 | S (partial) | $1,001 - $15,000 | ☐ |
| Strategic Asset Management II ⇒ Pimco Income CL [EF] | JT | 09/28/2022 | S | $1,001 - $15,000 | ☐ |
| Strategic Asset Management II ⇒ USAA Nasdaq 100 Index [EF] | JT | 01/19/2022 | S (partial) | $1,001 - $15,000 | ☐ |

| Asset | Owner | Date | Tx. Type | Amount | Cap. Gains > $200? |
| --- | --- | --- | --- | --- | --- |
| Strategic Asset Management II ⇒ USAA Nasdaq 100 Index [EF] | JT | 09/28/2022 | S (partial) | $1,001 - $15,000 | ✓ |

* 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 |
| --- | --- | --- |
| Doyle for Congress Committee | Spouse Salary | N/A |
| SERS | PENSION DISTRIBUTION | $10,932.00 |
| SSA | PENSION DISTRIBUTION | $4,959.00 |

## Schedule D: Liabilities

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
| --- | --- | --- | --- | --- |
| | Standard Bank, Monroeville, PA | December 2020 | Mortgage on 1916 Monongahela Ave. | $15,001 - $50,000 |
| | Dollar Bank, Pittsburgh, PA | August 2014 | Mortgage on Personal Residence - Not Rented | $15,001 - $50,000 |

## Schedule E: Positions

| Position | Name of Organization |
| --- | --- |
| Board of Directors (Uncompensated) | Howard Hanna Children's Free Care Fund Foundation |

## Schedule F: Agreements

| Date | Parties To | Terms of Agreement |
| --- | --- | --- |
| December 2022 | Myself and K&L Gates | Discussion of the scope of work and remuneration for part-time employment as a Government Affairs Counselor |

## 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

- Retirement Acct. Strategic Asset Mngt. II
- Strategic Asset Management II (Owner: JT)
  Location: US
- Structured Capital Strategies
  Description: 16B (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. Michael F. Doyle , 02/15/2023