



Filing ID #10057584

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Michael R. Turner
Status: Member
State/District: OH10

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/14/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
IRA 9527 ⇒ Fidelity MSCI Utilities Index ETF (FUTY) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ First Trust Cloud Computing ETF (SKYY) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Global X Funds Global X U.S. Infrastructure Development ETF (PAVE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Invesco KBW Bank ETF (KBWB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares 20+ Year Treasury Bond ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares Biotechnology ETF (IBB) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Core MSCI Emerging Markets ETF [EF]					<input type="checkbox"/>
IRA 9527 ⇒ iShares MBS ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares MSCI EAFE Min Vol Factor ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares MSCI Emerging Markets Min Vol Factor ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares TIPS Bond ETF (TIP) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: partial sale means less than \$1000 position as of 12/31/2023					
IRA 9527 ⇒ Schwab Short-Term U.S. Treasury ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Financial [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ The Communication Services Select Sector SPDR Fund [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ VanEck Semiconductor ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Consumer Staples ETF (VDC) [EF]					<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Industrials ETF (VIS) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Information Tech ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Intermediate-Term Corporate Bond ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Tax deferred acct					
IRA 9527 ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
IRA 9527 ⇒ Vanguard Materials ETF (VAW) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Short-Term Corporate Bond ETF (VCSH) [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
IRA 9527 ⇒ Vanguard Small-Cap ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
ML Brokerage Account 3813 ⇒ Preferred Deposit Money Market Cusip 99861VDMo [MF]		\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Ohio State PERS [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

* Investment vehicle 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?
IRA 9527 ⇒ Invesco KBW Bank ETF (KBWB) [EF]		04/13/2023	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		01/20/2023	P	\$1,001 - \$15,000	
DESCRIPTION: IRA purchase					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
IRA 9527 ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF] DESCRIPTION: purchase in IRA		07/24/2023	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF] DESCRIPTION: purchase in IRA		01/20/2023	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares Core MSCI Emerging Markets ETF (IEMG) [EF] DESCRIPTION: sale in IRA		01/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares MBS ETF (MBB) [EF] DESCRIPTION: sale in IRA		01/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares MBS ETF (MBB) [EF] DESCRIPTION: purchase in IRA		10/20/2023	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares MSCI EAFE Min Vol Factor ETF (EFAV) [EF] DESCRIPTION: sale in IRA		01/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares MSCI Emerging Markets Min Vol Factor ETF (EEMV) [EF] DESCRIPTION: sale in IRA		01/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ iShares TIPS Bond ETF (TIP) [EF] DESCRIPTION: purchase in IRA		07/24/2023	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares U.S. Aerospace & Defense ETF (ITA) [EF] DESCRIPTION: IRA purchase		01/20/2023	P	\$1,001 - \$15,000	
IRA 9527 ⇒ iShares U.S. Regional Banks ETF (IAT) [EF]		01/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒ Pacer Data & Infrastructure Real Estate ETF (SRVR) [EF]		01/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
IRA 9527 ⇒		01/20/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]					
DESCRIPTION: Purchase in IRA					
IRA 9527 ⇒ Schwab Short-Term U.S. Treasury ETF (SCHO) [EF]		07/24/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: sale in IRA					
IRA 9527 ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		04/13/2023	P	\$1,001 - \$15,000	
DESCRIPTION: purchase in IRA					
IRA 9527 ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		01/20/2023	P	\$1,001 - \$15,000	
DESCRIPTION: IRA purchase					
IRA 9527 ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		04/13/2023	P	\$1,001 - \$15,000	
DESCRIPTION: purchase in IRA					
IRA 9527 ⇒ VanEck Semiconductor ETF (SMH) [EF]		07/24/2023	P	\$1,001 - \$15,000	
DESCRIPTION: purchase in IRA					
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [EF]		04/13/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: sale in IRA					
IRA 9527 ⇒ Vanguard Information Tech ETF (VGT) [EF]		07/24/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: sale in IRA					
IRA 9527 ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		01/20/2023	P	\$1,001 - \$15,000	
DESCRIPTION: purchase in IRA					
IRA 9527 ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		07/24/2023	P	\$1,001 - \$15,000	
DESCRIPTION: purchase in IRA					
IRA 9527 ⇒ Vanguard Intermediate-Term Corporate Bond ETF (VCIT) [EF]		10/20/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: sale in IRA					
IRA 9527 ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]		07/24/2023	P	\$1,001 - \$15,000	
DESCRIPTION: purchase in IRA					
IRA 9527 ⇒ Vanguard Intermediate-Term Treasury ETF (VGIT) [EF]		10/20/2023	P	\$1,001 - \$15,000	
DESCRIPTION: purchase in IRA					
IRA 9527 ⇒ Vanguard Small-Cap ETF (VB) [EF]		01/20/2023	P	\$1,001 - \$15,000	
DESCRIPTION: purchase in IRA					
IRA 9527 ⇒ Vanguard Total International Bond ETF (BNDX) [EF]		10/20/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: sale in IRA					

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SCHEDULE C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Bank of America Home Loans	June 2020	DC Residence Mortgage	\$250,001 - \$500,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 1994	Myself & the State of Ohio	Continued Participation in the Legislative Pension Plan

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Association of Marshall Scholars	01/12/2023	01/17/2023	Washington DC - Oxford, UK - London, UK - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none">IRA 9527ML Brokerage Account 3813 (100% Interest) LOCATION: US DESCRIPTION: Money Market

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 R. Turner , 05/14/2024