



FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Joyce Beatty
Status: Member
State/District: OH03

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? |
|--|-------|---------------------------|----------------|-------------------|--------------------------|
| Becton, Dickinson and Company Common Stock (BDX) [ST] | | \$1 - \$1,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Cardinal Health, Inc. (CAH) [ST] | | \$1,001 - \$15,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| CareFusion Corporation (CFN) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Congressional Federal Credit Union [BA] | | \$1 - \$1,000 | Interest | None | <input type="checkbox"/> |
| Federal Home Loan Mortgage Corporation (FMCC) [ST] | | \$1 - \$1,000 | Dividends | None | <input type="checkbox"/> |
| Federated Hermes Government Obligations Fund Cap Shares (GOCXX) [MF] | | \$15,001 - \$50,000 | Dividends | None | <input type="checkbox"/> |
| Fifth Third Bank [BA] | | \$1,000,001 - \$5,000,000 | Interest | None | <input type="checkbox"/> |
| Fifth Third Bank [BA] | | \$250,001 - \$500,000 | Interest | \$201 - \$1,000 | <input type="checkbox"/> |
| Huntington Bancshares Incorporated (HBAN) [ST] | | \$1,001 - \$15,000 | Dividends | \$201 - | <input type="checkbox"/> |

| Asset | Owner | Value of Asset | Income Type(s) | Income | Tx. > \$1,000? |
|--|-------|-----------------------|----------------|---------------------|--------------------------|
| | | | | \$1,000 | <input type="checkbox"/> |
| ishares Inc. Singapore [MF] | | \$1 - \$1,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Joyce and Otto Beatty Scholarship Fund [BA] | | \$50,001 - \$100,000 | None | | <input type="checkbox"/> |
| Joyce Beatty & Associates, Inc. [BA] | | \$100,001 - \$250,000 | None | | <input type="checkbox"/> |
| JP Morgan Chase & Co. Common Stock (JPM) [ST] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| JP Morgan Chase & Co. Common Stock (JPM) [ST] | | \$15,001 - \$50,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Meta Platforms, Inc. - Class A Common Stock (META) [ST] | | \$50,001 - \$100,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Microsoft Corporation (MSFT) [ST] | | \$1,001 - \$15,000 | Dividends | \$1,001 - \$2,500 | <input type="checkbox"/> |
| Nuveen NASDAQ 100 Dynamic Overwrite Fund - Closed End Fund (QQQX) [ST] | | \$1,001 - \$15,000 | Dividends | \$1 - \$200 | <input type="checkbox"/> |
| Ohio Credit [BA] | | \$1,001 - \$15,000 | Interest | \$1 - \$200 | <input type="checkbox"/> |
| PNC (Pittsburg National Corp Bank) [BA] | | \$100,001 - \$250,000 | Interest | \$201 - \$1,000 | <input type="checkbox"/> |
| Source Capital, Inc [MF] | | \$1,001 - \$15,000 | Dividends | None | <input type="checkbox"/> |
| DESCRIPTION: Spouse acct. | | | | | |
| Touchstone Flexible Income Fund [MF] | | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | <input type="checkbox"/> |
| Uber Technologies, Inc. Common Stock (UBER) [ST] | | \$15,001 - \$50,000 | Dividends | \$15,001 - \$50,000 | <input type="checkbox"/> |

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

None disclosed.

SCHEDULE C: EARNED INCOME

| Source | Type | Amount |
|---|----------------------------|--------------|
| Ohio Public Employees Retirement System | Retirement for self | \$253,323.12 |
| Ohio Public Employees Retirement System | Spouse pension after death | \$20,000.00 |

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

| Date | Parties To | Terms of Agreement |
|---------------|------------------|--|
| November 2011 | Myself and OPERS | My on-going retirement for 33 years of working service |

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

| Source | Trip Details | | | | Inclusions | | |
|---|--------------|------------|---|------------------|-------------------------------------|-------------------------------------|--------------------------|
| | Start Date | End Date | Itinerary | Days at Own Exp. | Lodging? | Food? | Family? |
| Congressional Delegation | 07/5/2023 | 07/6/2023 | Washington DC - Trinidad and Tobago - Washington DC | 2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| American Israel Education Foundation AIEF | 09/1/2023 | 09/10/2023 | Newark New Jersey - Jerusalem Israel - Kigali Rwanda - Washington DC | 9 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Golden Jubilee Bahamas MRA | 07/6/2023 | 05/10/2024 | Columbus Ohio - Nassau - Washington DC | 4 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

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. Joyce Beatty , 05/14/2024