



Filing ID #10060371

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Hon. Marcy Kaptur
Status: Member
State/District: OH09

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 05/15/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Congressional Federal Credit Union [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
DESCRIPTION: Funds accrued in this account are from foregone congressional pay (raises) and are distributed annually to charitable causes.					
Fleet Rd [RP]		\$50,001 - \$100,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Toledo, OH, US					
Harlan Rd [RP]		\$50,001 - \$100,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Toledo, OH, US					
Huntington Bank NA [BA]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Institution for Savings [BA]		None	Interest	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Key Bank [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Live Oak Bank [BA]		None	Interest	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
M1 Bank [BA]		\$100,001 - \$250,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Nutrien Ltd. Common Shares (NTR) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
COMMENTS: Inherited family stock. No transactions enacted or anticipated.					
Rivard Rd [RP]		\$50,001 - \$100,000	None		<input type="checkbox"/>
LOCATION: Toledo, OH, US DESCRIPTION: no renter or rental income in 2023					
Schwab Money Market [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
United Fidelity [BA]		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
US Savings Bonds [GS]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Vanguard Total Bond Market ETF (BND) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

* 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?
Institution for Savings [BA]		08/3/2023	S	\$100,001 - \$250,000	<input type="checkbox"/>
Live Oak Bank [BA]		08/3/2023	S	\$100,001 - \$250,000	<input type="checkbox"/>
M1 Bank [BA]		08/4/2023	P	\$100,001 - \$250,000	
United Fidelity [BA]		08/4/2023	P	\$100,001 - \$250,000	
Vanguard Total Bond Market ETF (BND) [EF]		12/21/2023	P	\$1,001 - \$15,000	

* 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
	Congressional Federal Credit Union	2011	Mortgage	\$50,001 - \$100,000
	COMMENTS: Mortgage on Washington, D.C. area condominium apartment used while Congress is in session. No mortgage on permanent family home in Ohio.			
	Congressional Federal Credit Union	Nov. 2015	Home Equity Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Trustee	The Anastasia Fund
COMMENTS: The Anastasia Fund, P.O. Box 2121, Toledo, OH 43603. [a charity established in the names of Anastasia and Stephen Kaptur]	

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.

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. Marcy Kaptur , 05/15/2024