Filing ID #10076448

Financial Disclosure Report

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Filer Information

Name: Hon. John Joyce
Status: Member
State/District: PA13

Filing Information

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/13/2026

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Chester County Pennsylvania Health Ed Facilities Revenue Bond [GS] Description: Redeemed bond.		None	Interest	$5,001 - $15,000	
Chester County Pennsylvania Health Ed Facilities Revenue Bond [GS] Description: Redeemed bond.	SP	None	Interest	$1,001 - $2,500	
Congressional Federal Credit Union Checking Account [BA]		$50,001 - $100,000	None		
Congressional Federal Credit Union Savings Account [BA]		$1,001 - $15,000	None		
Invesco Pennsylvania Municipal Fund - OPATX [MF]	SP	Spouse/DC Over $1,000,000	Capital Gains, Dividends	$50,001 - $100,000	
Invesco Pennsylvania Municipal Fund - OPATX [MF]		$1,000,001 - $5,000,000	Capital Gains, Dividends	$50,001 - $100,000	
Logan Blvd Office [RP] Location: Altoona, PA, US	SP	$250,001 - $500,000	Rent	$50,001 - $100,000	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
M&T Bank Checking Account [BA]	JT	$100,001 - $250,000	None		☐
M&T Bank Savings Account [BA]	JT	$1,001 - $15,000	None		☐
Mairs & Power Growth Fund - MPGFX [MF]	SP	Spouse/DC Over $1,000,000	Capital Gains, Dividends	$50,001 - $100,000	☑
Torray Fund - TORYX [MF]	SP	$250,001 - $500,000	Dividends	$50,001 - $100,000	☑
Vanguard 500 Index Fund Admiral Shares - VFIAX [MF]		$250,001 - $500,000	Dividends	$2,501 - $5,000	☐
Vanguard Federal Money Market Sweep Account [BA]		$1,001 - $15,000	None		☐
Vanguard Value Index Fd Admiral Shs (VVIAX) [MF]		$250,001 - $500,000	Dividends	$5,001 - $15,000	☐
White Oak Select Growth Fund [MF]		$250,001 - $500,000	Capital Gains, Dividends	$15,001 - $50,000	☑
Cabin Group, LLC ⇒ Residential Real Estate [RP] LOCATION: Altoona, PA, US		$50,001 - $100,000	None		☐
LPL Financial IRA ⇒ Brokerage Sweep Account [BA]	SP	$1,001 - $15,000	Tax-Deferred		☐
LPL Financial IRA ⇒ Donoghue Forlines Dividend Fund Class I (PWDIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
LPL Financial IRA ⇒ Donoghue Forlines Momentum Fund Class I (MOJOX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☑
LPL Financial IRA ⇒ Donoghue Forlines Risk Managed Income Fund Class I (FLOTX) [MF]	SP	$15,001 - $50,000	Tax-Deferred		☐
LPL Financial IRA ⇒ Donoghue Forlines Tactical Allocation Fund Class I (GTAIX) [MF]	SP	$50,001 - $100,000	Tax-Deferred		☑
LPL Financial IRA ⇒	SP	$15,001 - $50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Donoghue Forlines Tactical Income Fund Class I (PWRIX) [MF]					
Stifel - Filer- Brokerage ⇒ Nuveen High Yield Muni Bond Fund - NHMAX [MF]		$1,000,001 - $5,000,000	Dividends	$50,001 - $100,000	
Stifel - Spouse - Brokerage ⇒ Nuveen High Yield Muni Bond Fund - NHMAX [MF]	SP	Spouse/DC Over $1,000,000	Dividends	$50,001 - $100,000	
Stifel- Joint Account ⇒ Invesco Pennsylvania Municipal Fund - OPATX [MF]		$1,001 - $15,000	Dividends	$201 - $1,000	
Stifel Retirement Account - Alice ⇒ Artisan International Value Advisor (APDKX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Stifel Retirement Account - Alice ⇒ Artisan Value Advisor (APDLX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Stifel Retirement Account - Alice ⇒ Citigroup Inc Dep Shs Repstg Perpetual (-) [CS] DESCRIPTION: Redeemed corporate bond.	SP	None	Tax-Deferred		
Stifel Retirement Account - Alice ⇒ Citizens FINL GRP Inc NON CUML PFD SER B [CS] DESCRIPTION: Corporate Bond.	SP	$50,001 - $100,000	Tax-Deferred		
Stifel Retirement Account - Alice ⇒ Diamond Hill Small Cap Fund Class I (DHSIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Stifel Retirement Account - Alice ⇒ Fifth Third Bancorp Depositary Share representing 1/25th Preferred Series H (FTBXL) [CS] DESCRIPTION: Corporate note.	SP	$100,001 - $250,000	Tax-Deferred		
Stifel Retirement Account - Alice ⇒ Harding Loevner International Eq Instl (HLMIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Stifel Retirement Account - Alice ⇒ Invesco Developing Markets Fund Class Y (ODVYX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		
Stifel Retirement Account - Alice ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]	SP	$100,001 - $250,000	Tax-Deferred		
Stifel Retirement Account - Alice ⇒ iShares TIPS Bond ETF (TIP) [EF]	SP	$50,001 - $100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Stifel Retirement Account - Alice ⇒ Nuveen High Yield Municipal Bd Fd Class I (NHMRX) [MF]	SP	$250,001 - $500,000	Tax-Deferred		☑
Stifel Retirement Account - Alice ⇒ PIMCO Preferred and Capital Securities Fund Class Institutional (PFINX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Stifel Retirement Account - Alice ⇒ RiverPark/Wedgewood Institutional (RWGIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Stifel Retirement Account - Alice ⇒ Seagate HDD Cayman Sr Note CPN Due 1/1/25 [CS] DESCRIPTION: Redeemed corporate note.	SP	None	Tax-Deferred		☐
Stifel Retirement Account - Alice ⇒ SouthernSun U.S. Equity Fund Class I (SSEIX) [MF]	SP	$1,001 - $15,000	Tax-Deferred		☐
Stifel Retirement Account - Alice ⇒ Stifel Brokerage Sweep Account [BA]	SP	$15,001 - $50,000	Tax-Deferred		☐
Stifel Retirement Account - Alice ⇒ Vanguard High Dividend Yield Index Fund Admiral Shares (VHYAX) [MF]	SP	$50,001 - $100,000	Tax-Deferred		☑
Stifel Retirement Account - Filer ⇒ Artisan International Value Fund Advisor Shares (APDKX) [MF]		$15,001 - $50,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Artisan Value Advisor (APDLX) [MF]		$15,001 - $50,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Citigroup Inc Dep Shs Repstg (-) [CS] DESCRIPTION: Redeemed corporate bond.		None	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Citizens FINL GRP INC. Non CUML PFD Ser B [CS] DESCRIPTION: Corporate note.		$50,001 - $100,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Diamond Hill Small Cap Fund Class I (DHSIX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Fifth Third Bancorp Depositary Share representing 1/25th		$100,001 - $250,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Preferred Series H (FTBXL) [CS] DESCRIPTION: Corporate Note.					
Stifel Retirement Account - Filer ⇒ Harding Loevner International Eq Instl (HLMIX) [MF]		$15,001 - $50,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Invesco Developing Markets Fund Class Y (ODVYX) [MF]		$15,001 - $50,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		$100,001 - $250,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ iShares TIPS Bond ETF (TIP) [EF]		$50,001 - $100,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ JP Morgan Chase & Co Series Q Variable Note [CS] DESCRIPTION: Redeemed corporate note.		None	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Nuveen High Yield Municipal Bd Fd Class I (NHMRX) [MF]		$500,001 - $1,000,000	Tax-Deferred		☑
Stifel Retirement Account - Filer ⇒ RiverPark/Wedgewood Institutional (RWGIX) [MF]		$1,001 - $15,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Seagate HDD Senior Note [CS] DESCRIPTION: Redeemed corporate note.		None	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ SouthernSun U.S. Equity Fund Class I (SSEIX) [MF]		$15,001 - $50,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Stifel Brokerage Sweep Account [BA]		$50,001 - $100,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Vanguard 500 Index Fd Admiral Shs (VFIAX) [MF]		$100,001 - $250,000	Tax-Deferred		☐
Stifel Retirement Account - Filer ⇒ Vanguard High Dividend Yield Index Fund Admiral Shares (VHYAX) [MF]		$100,001 - $250,000	Tax-Deferred		☑
Stifel Retirement Account - Filer ⇒ White Oak Select Growth Fund - WOGSX [MF]		$50,001 - $100,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?

* 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?
Stifel Retirement Account - Alice ⇒ Vanguard High Dividend Yield Index Fund Admiral Shares (VHYAX) [MF]	SP	03/10/2025	P	$50,001 - $100,000	
Stifel Retirement Account - Alice ⇒ Nuveen High Yield Municipal Bd Fd Class I (NHMRX) [MF]	SP	03/10/2025	S (partial)	$50,001 - $100,000	☐
Stifel Retirement Account - Filer ⇒ Vanguard High Dividend Yield Index Fund Admiral Shares (VHYAX) [MF]		03/10/2025	P	$50,001 - $100,000	
Stifel Retirement Account - Filer ⇒ Nuveen High Yield Municipal Bd Fd Class I (NHMRX) [MF]		03/10/2025	S (partial)	$50,001 - $100,000	☐
The Torray Fund (TORYX) [MF]	SP	03/28/2025	P	$1,001 - $15,000	
The Torray Fund (TORYX) [MF]	SP	06/27/2025	P	$1,001 - $15,000	
The Torray Fund (TORYX) [MF]	SP	09/29/2025	P	$1,001 - $15,000	
The Torray Fund (TORYX) [MF]	SP	11/25/2025	P	$50,001 - $100,000	
The Torray Fund (TORYX) [MF]	SP	12/30/2025	P	$1,001 - $15,000	
Mairs & Power Growth Fund (MPGFX) [MF]	SP	06/27/2025	P	$1,001 - $15,000	
Mairs & Power Growth Fund (MPGFX) [MF]	SP	12/15/2025	P	$50,001 - $100,000	
White Oak Select Growth Fund (WOGSX) [MF]		12/29/2025	P	$15,001 - $50,000	
LPL Financial IRA ⇒ Donoghue Forlines Tactical Allocation Fund Class I (GTAIX) [MF]	SP	12/29/2025	P	$1,001 - $15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
LPL Financial IRA ⇒ Donoghue Forlines Momentum Fund Class I (MOJOX) [MF]	SP	12/29/2025	P	$1,001 - $15,000	

* 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 C: Earned Income

None disclosed.

Schedule D: Liabilities

None disclosed.

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

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?
The Aspen Institute	05/26/2025	05/30/2025	Dulles, Virginia - Malaga, Spain - Sevilla, Spain - Dulles, Virginia	5	☑	☑	☐

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Investment Vehicle Details

- Stifel Retirement Account - Alice (Owner: SP)
- Stifel Retirement Account - Filer
- Stifel- Joint Account
- LPL Financial IRA (Owner: SP)

- Stifel - Filer- Brokerage
- Cabin Group, LLC
  Location: US
- Stifel - Spouse - Brokerage (Owner: SP)

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. John Joyce , 08/13/2026