



Filing ID #10076774

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 05/12/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
AI Infrastructure Portfolio Ser: 1 [OT] DESCRIPTION: FT UNIT AI Infrastructure portfolio purchase \$25,000		\$15,001 - \$50,000	None		☒
Becton, Dickinson and Company Common Stock (BDX) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	☐
Cardinal Health, Inc. (CAH) [ST]		\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	☐
CareFusion Corporation (CFN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Congressional Federal Credit Union [BA]		\$1 - \$1,000	Interest	None	☐
Federal Home Loan Mortgage Corporation (FMCC) [ST]		\$1 - \$1,000	Dividends	None	☐
Federated Hermes Government Obligations Fund Cap Shares (GOCXX) [MF]		\$15,001 - \$50,000	Dividends	None	☐
Fifth Third Bank [BA]		\$1,000,001 - \$5,000,000	Interest	None	☐

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

* 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?
AI Infrastructure Portfolio Ser: 1 [OT] LOCATION: Columbus, OH, US DESCRIPTION: FT UNIT 12508 AI Infrastructure		01/22/2026	P	\$15,001 - \$50,000	

* 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
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

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Ripon Society	08/04/2025	08/09/2025	Columbus - Geneva Switzerland - Columbus	6	☒	☒	☐

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 , 05/12/2026