



Filing ID #10081686

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Mike Carey
Status: Member
State/District: OH15

FILING INFORMATION

Filing Type: Amendment Report
Filing Year: 2025
Filing Date: 08/18/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
City Park Interior, LLC, 100% Interest [OL] LOCATION: Columbus, OH, US DESCRIPTION: This business is an interior decorating business owned solely by the spouse.	SP	\$100,001 - \$250,000	Business Income	\$100,001 - \$1,000,000	☐
Fifth Third Bank Account [BA] DESCRIPTION: Spouses personal bank account with Fifth Third Bank.	SP	\$1,001 - \$15,000	None		☐
Huntington National Bank [BA] DESCRIPTION: Personal bank account with Huntington National Bank.		\$1,001 - \$15,000	None		☐
Merrill Lynch SEP Account [OT] DESCRIPTION: Investment income from Merrill Lynch Account.	SP	None	Capital Gains, Dividends	\$15,001 - \$50,000	☐
New York Life Securities [PS] DESCRIPTION: Dividend Income from NY Life Securities	SP	\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	☒
Rea Wealth Management [IH] DESCRIPTION: Investment Limited Partners, LTD changed their name to Rea Wealth Management.		\$50,001 - \$100,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Institutional Target Retirement 2035 [OT] DESCRIPTION: 401(k) account with TransAmerica		\$250,001 - \$500,000	None		☐
Conrad 529 ⇒ Conrad 529 [5P] LOCATION: OH	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Conrad UTMA ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	DC	\$1,001 - \$15,000	None		☐
Conrad UTMA ⇒ State Street SPDR MSCI ACWI ex-US ETF (CWI) [EF]	DC	\$1,001 - \$15,000	None		☐
Conrad UTMA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	DC	\$1 - \$1,000	None		☐
Merrill Lynch ETF Account ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Merrill Lynch ETF Account ⇒ State Street SPDR MSCI ACWI ex-US ETF (CWI) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Merrill Lynch ETF Account ⇒ Vanguard Total Bond Market ETF (BND) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Merrill Lynch IRA ⇒ Allspring Core Plus Bond Fund Class Institutional (WIPIX) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	SP	None	Capital Gains	\$1 - \$200	☒
Merrill Lynch IRA ⇒ Cash [BA] DESCRIPTION: Cash held in IRA	SP	\$1 - \$1,000	None		☐
Merrill Lynch IRA ⇒ Columbia Dividend Income Fund Class I (GSFTX) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒ Columbia Research Enhanced Core ETF (RECS) [EF]	SP	\$1,001 - \$15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Merrill Lynch IRA ⇒ Eaton Vance Short Duration Strategic Income Fund -Class I (ESIIX) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒ Fidelity Advisor Growth Opportunities Fund Class I [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒ Fidelity Advisor Investment Grade Bond Fund: Class I (FGBPX) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒ FullerThaler Behavioral Small-Cap Growth Fund Institutional Shares (FTXSX) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒ iShares Currency Hedged MSCI EAFE ETF (HEFA) [EF]	SP	None	Capital Gains	\$201 - \$1,000	☒
Merrill Lynch IRA ⇒ iShares Russell 1000 Growth ETF (IWF) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒ iShares S&P 500 Index Fund - Institutional (BSPIX) [MF]	SP	None	Capital Gains	\$2,501 - \$5,000	☒
Merrill Lynch IRA ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒ NYLI FTSE International Equity Currency Neutral ETF (HFXI) [EF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]	SP	\$1,001 - \$15,000	Capital Gains	\$201 - \$1,000	☒
Merrill Lynch IRA ⇒ PGIM Absolute Return Bond Fund Class Z (PADZX) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch IRA ⇒	SP	\$1,001 - \$15,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Putnam Focused Large Cap Value ETF (PVAL) [EF]					☐
Merrill Lynch IRA ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch MA Account ⇒ Allspring Core Plus Bond Fund Inst Class (WIPIX) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch MA Account ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	SP	None	Capital Gains	\$1 - \$200	☐
Merrill Lynch MA Account ⇒ Columbia Dividend Income Fund Class I (GSFTX) [MF]	SP	\$15,001 - \$50,000	None		☒
Merrill Lynch MA Account ⇒ Columbia Research Enhanced Core ETF (RECS) [EF]	SP	\$1,001 - \$15,000	None		☒
Merrill Lynch MA Account ⇒ Eaton Vance Short Duration Strategic Income Fund -Class I (ESIIX) [MF]	SP	\$15,001 - \$50,000	None		☒
Merrill Lynch MA Account ⇒ Fidelity Advisor Growth Opportunities Fund: Class I (FAGCX) [MF]	SP	\$15,001 - \$50,000	Capital Gains	\$201 - \$1,000	☒
Merrill Lynch MA Account ⇒ Fidelity Advisor Investment Grade Bond Fund: Class I (FGBPX) [MF]	SP	\$1,001 - \$15,000	None		☒
Merrill Lynch MA Account ⇒ FullerThaler Behavioral Small-Cap Growth Fund Institutional Shares (FTXSX) [MF]	SP	\$1,001 - \$15,000	None		☒
Merrill Lynch MA Account ⇒ Global X S&P 500 Covered Call & Growth ETF (XYLG) [EF]	SP	None	Capital Gains	\$1 - \$200	☒
Merrill Lynch MA Account ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]	SP	\$15,001 - \$50,000	None		☒
Merrill Lynch MA Account ⇒ iShares Currency Hedged MSCI EAFE ETF (HEFA) [EF]	SP	None	Capital Gains	\$201 - \$1,000	☒
Merrill Lynch MA Account ⇒	SP	\$1,001 - \$15,000	Capital Gains	\$1 - \$200	☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Russell 1000 Growth Fund (IWF) [EF]					☐
Merrill Lynch MA Account ⇒ iShares S&P 500 Index Fund - Institutional (BSPIX) [MF]	SP	\$1,001 - \$15,000	Capital Gains	\$2,501 - \$5,000	☒
Merrill Lynch MA Account ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	\$1,001 - \$15,000	None		☒
Merrill Lynch MA Account ⇒ NYLI FTSE International Equity Currency Neutral ETF (HFXI) [EF]	SP	\$1,001 - \$15,000	None		☒
Merrill Lynch MA Account ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]	SP	None	Capital Gains	\$201 - \$1,000	☒
Merrill Lynch MA Account ⇒ PGIM Absolute Return Bond Fund Class Z (PADZX) [MF]	SP	\$1,001 - \$15,000	None		☒
Merrill Lynch MA Account ⇒ Putnam Focused Large Cap Value ETF (PVAL) [EF]	SP	\$15,001 - \$50,000	Capital Gains	\$1 - \$200	☒
Merrill Lynch MA Account ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	\$1,001 - \$15,000	None		☒
Merrill Lynch SEP Account ⇒ BlackRock Liquidity Funds FedFund - Premier (BUPXX) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch SEP Account ⇒ Cash [BA]	SP	\$1,001 - \$15,000	None		☐
DESCRIPTION: Cash held in Merrill Lynch brokerage account					
Merrill Lynch SEP Account ⇒ Fidelity Advisor Growth Opportunities Fund: Class I (FAGCX) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch SEP Account ⇒ FullerThaler Behavioral Small-Cap Growth Fund Institutional Shares (FTXSX) [MF]	SP	\$1,001 - \$15,000	None		☐
Merrill Lynch SEP Account ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [EF]	SP	\$15,001 - \$50,000	None		☐
Merrill Lynch SEP Account ⇒	SP	\$50,001 -	Capital Gains	\$2,501 -	☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares Core S&P U.S. Growth ETF (IUSG) [EF]		\$100,000		\$5,000	☐
Merrill Lynch SEP Account ⇒ iShares Core S&P U.S. Value ETF (IUSV) [EF]	SP	\$50,001 - \$100,000	None		☐
Merrill Lynch SEP Account ⇒ iShares U.S. Treasury Bond ETF (GOVT) [EF]	SP	\$15,001 - \$50,000	None		☒
Merrill Lynch SEP Account ⇒ SPDR Portfolio Long Term Treasury ETF (SPTL) [EF]	SP	None	Capital Gains	\$1,001 - \$2,500	☒
Merrill Lynch SEP Account ⇒ State Street SPDR Portfolio High Yield Bond ETF (SPHY) [EF]	SP	\$1,001 - \$15,000	None		☒
Merrill Lynch SEP Account ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	\$15,001 - \$50,000	None		☐
Merrill Lynch SEP Account ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	\$15,001 - \$50,000	None		☐
Merrill Lynch SEP Account ⇒ Vanguard Mortgage-Backed Securities Index Fund [MF]	SP	\$1,001 - \$15,000	None		☒
Merrill Lynch SEP Account ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]	SP	\$15,001 - \$50,000	None		☒
Merrill Lynch SEP Account ⇒ Vanguard Total International Bond ETF (BNDX) [EF]	SP	\$1,001 - \$15,000	None		☐
Miles 529 ⇒ Miles 529 [5P] LOCATION: OH	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Miles UTMA ⇒ iShares Core S&P Total U.S. Stock Market ETF (ITOT) [EF]	DC	\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	☒
Miles UTMA ⇒ State Street SPDR MSCI ACWI ex-US ETF (CWI) [EF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	☐
Miles UTMA ⇒ Vanguard Total Bond Market ETF (BND) [EF]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	☐
Miles UTMA ⇒	DC	None	None		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Vanguard Total Stock Market ETF (VTI) [EF]					

* 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?
Merrill Lynch IRA ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	SP	03/12/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch IRA ⇒ iShares Currency Hedged MSCI EAFE ETF (HEFA) [EF]	SP	03/12/2025	S (partial)	\$1,001 - \$15,000	☒
Merrill Lynch IRA ⇒ iShares S&P 500 Index Fund - Institutional (BSPIX) [MF]	SP	08/07/2025	S (partial)	\$1,001 - \$15,000	☒
Merrill Lynch IRA ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]	SP	11/25/2025	P	\$1,001 - \$15,000	
Merrill Lynch IRA ⇒ Eaton Vance Atlanta Capital SMID-Cap Fund Class I (EISMX) [MF]	SP	11/25/2015	S	\$1,001 - \$15,000	☐
Merrill Lynch IRA ⇒ Putnam Focused Large Cap Value ETF (PVAL) [EF]	SP	08/07/2025	P	\$1,001 - \$15,000	
Merrill Lynch SEP Account ⇒ State Street SPDR Portfolio Long Term Treasury ETF (SPTL) [EF]	SP	03/14/2025	S	\$1,001 - \$15,000	☐
Merrill Lynch IRA ⇒ Columbia Research Enhanced Core ETF (RECS) [EF]	SP	08/07/2025	P	\$1,001 - \$15,000	
Merrill Lynch IRA ⇒ Columbia Dividend Income Fund Class I (GSFTX) [MF]	SP	08/07/2025	P	\$1,001 - \$15,000	
Merrill Lynch IRA ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]	SP	08/07/2025	S	\$1,001 - \$15,000	☒
Merrill Lynch IRA ⇒ Putnam Focused Large Cap Value ETF (PVAL) [EF]	SP	03/12/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch IRA ⇒ NYLI FTSE International Equity Currency Neutral ETF (HFXI) [EF]	SP	03/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch IRA ⇒ PGIM Absolute Return Bond Fund Class Z (PADZX) [MF]	SP	03/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch IRA ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]	SP	03/12/2025	P	\$1,001 - \$15,000	
Merrill Lynch IRA ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]	SP	03/12/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch IRA ⇒ Fidelity Advisor Investment Grade Bond Fund: Class I (FGBPX) [MF]	SP	03/12/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch SEP Account ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [EF]	SP	09/30/2025	P	\$1,001 - \$15,000	
Merrill Lynch SEP Account ⇒ iShares Core S&P U.S. Value ETF (IUSV) [EF]	SP	09/30/2025	P	\$1,001 - \$15,000	
Merrill Lynch SEP Account ⇒ iShares U.S. Treasury Bond ETF (GOVT) [EF]	SP	09/30/2025	P	\$1,001 - \$15,000	
Merrill Lynch SEP Account ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [EF]	SP	09/30/2025	S (partial)	\$1,001 - \$15,000	☒
Merrill Lynch SEP Account ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]	SP	09/30/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch SEP Account ⇒ iShares Broad USD Investment Grade Corporate Bond ETF (USIG) [EF]	SP	03/14/2025	P	\$1,001 - \$15,000	
Merrill Lynch SEP Account ⇒ Vanguard FTSE Developed Markets ETF (VEA) [EF]	SP	03/14/2025	P	\$1,001 - \$15,000	
Merrill Lynch SEP Account ⇒ iShares Core S&P U.S. Growth ETF (IUSG) [EF]	SP	03/14/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch SEP Account ⇒ iShares Core S&P U.S. Value ETF (IUSV) [EF]	SP	03/14/2025	P	\$1,001 - \$15,000	
Merrill Lynch SEP Account ⇒ State Street SPDR Portfolio High Yield Bond ETF (SPHY) [EF]	SP	03/14/2025	P	\$1,001 - \$15,000	
Merrill Lynch SEP Account ⇒ Vanguard Mortgage-Backed Securities ETF (VMBS) [EF]	SP	03/14/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch SEP Account ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]	SP	03/14/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch SEP Account ⇒ iShares U.S. Treasury Bond ETF (GOVT) [EF]	SP	03/14/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ Global X S&P 500 Covered Call & Growth ETF (XYLG) [EF]	SP	12/19/2025	S	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	12/19/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ JPMorgan Equity Premium Income ETF (JEPI) [EF]	SP	11/18/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ Global X S&P 500 Covered Call & Growth ETF (XYLG) [EF]	SP	11/18/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ Eaton Vance Short Duration Strategic Income Fund -Class I (ESIIX) [MF]	SP	11/18/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ Putnam Focused Large Cap Value ETF (PVAL) [EF]	SP	11/16/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ Vanguard Morningstar Small-Cap Value ETF (VBR) [EF]	SP	11/26/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ FullerThaler Behavioral Small-Cap Growth Fund Institutional Shares (FTXSX) [MF]	SP	11/26/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ Eaton Vance Short Duration Strategic Income Fund -Class I	SP	11/26/2026	S (partial)	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
(ESIIX) [MF]					
Merrill Lynch MA Account ⇒ Putnam Focused Large Cap Value ETF (PVAL) [EF]	SP	08/08/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ Columbia Research Enhanced Core ETF (RECS) [EF]	SP	08/08/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]	SP	08/08/2025	S	\$1,001 - \$15,000	☒
Merrill Lynch MA Account ⇒ Columbia Dividend Income Fund Class I (GSFTX) [MF]	SP	08/08/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ iShares S&P 500 Index Fund - Institutional (BSPIX) [MF]	SP	08/08/2025	S (partial)	\$1,001 - \$15,000	☒
Merrill Lynch MA Account ⇒ Fidelity Advisor Growth Opportunities Fund: Class I (FAGCX) [MF]	SP	08/08/2025	S (partial)	\$1,001 - \$15,000	☒
Merrill Lynch MA Account ⇒ iShares Russell 1000 Growth Fund (IWF) [EF]	SP	05/16/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ Eaton Vance Short Duration Strategic Income Fund -Class I (ESIIX) [MF]	SP	05/16/2026	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ Fidelity Advisor Investment Grade Bond Fund: Class I (FGBPXX) [MF]	SP	05/15/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ PGIM Absolute Return Bond Fund Class Z (PADZX) [MF]	SP	05/16/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ Allspring Core Plus Bond Fund Inst Class (WIPIX) [MF]	SP	05/16/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ Fidelity Advisor Growth Opportunities Fund: Class I (FAGCX) [MF]	SP	05/16/2025	S (partial)	\$1,001 - \$15,000	☒
Merrill Lynch MA Account ⇒ Putnam Focused Large Cap Value ETF (PVAL) [EF]	SP	03/13/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch MA Account ⇒ NYLI FTSE International Equity Currency Neutral ETF (HFXI) [EF]	SP	03/13/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ iShares Currency Hedged MSCI EAFE ETF (HEFA) [EF]	SP	03/13/2025	S	\$1,001 - \$15,000	☒
Merrill Lynch MA Account ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]	SP	03/13/2025	S (partial)	\$1,001 - \$15,000	☒
Merrill Lynch MA Account ⇒ FullerThaler Behavioral Small-Cap Growth Fund Institutional Shares (FTXSX) [MF]	SP	03/13/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ Fidelity Advisor Investment Grade Bond Fund: Class I (FGBPX) [MF]	SP	03/13/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ PGIM Absolute Return Bond Fund Class Z (PADZX) [MF]	SP	03/13/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ BlackRock Strategic Income Opportunities Portfolio - Institutional (BSIIX) [MF]	SP	03/13/2025	S	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ iShares S&P 500 Index Fund - Institutional (BSPIX) [MF]	SP	03/13/2025	S (partial)	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]	SP	03/13/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ Fidelity Advisor Growth Opportunities Fund: Class I (FAGCX) [MF]	SP	03/13/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	SP	01/15/2025	S	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ iShares Russell Mid-Cap ETF (IWR) [EF]	SP	01/15/2025	S	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]	SP	01/15/2025	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch MA Account ⇒ iShares Core MSCI EAFE ETF (IEFA) [EF]	SP	01/15/2025	S	\$1,001 - \$15,000	☐
Merrill Lynch MA Account ⇒ Eaton Vance Short Duration Strategic Income Fund -Class I (ESIIX) [MF]	SP	01/15/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ Columbia Dividend Income Fund Class I (GSFTX) [MF]	SP	01/15/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ Allspring Core Plus Bond Fund Inst Class (WIPIX) [MF]	SP	01/15/2025	P	\$1,001 - \$15,000	
Merrill Lynch MA Account ⇒ Goldman Sachs GQG Partners International Opportunities Fund Institutional Shares (GSIMX) [MF]	SP	01/15/2025	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

Source	Type	Amount
National Financial Services LLC	Retirement plan distribution	\$29,508.17
City Park Interiors LLC	Spouse Salary	N/A
City Park Interiors LLC	Spouse Business Income	N/A

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?
Bipartisan Policy Center	04/03/2025	04/05/2025	Washington, DC - Chicago, IL - Columbus, OH	0	☒	☒	☐
The Ripon Society and The Franklin Center for Global Policy	08/04/2025	08/12/2025	Columbus, OH - Geneva, Switzerland - Columbus, OH	0	☒	☒	☒

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

◦ Merrill Lynch SEP Account (Owner: SP) ◦ Miles 529 (Owner: SP) LOCATION: OH ◦ Conrad 529 (Owner: SP) LOCATION: OH ◦ Conrad UTMA (Owner: DC) LOCATION: US ◦ Merrill Lynch IRA (Owner: SP) ◦ Miles UTMA (Owner: DC) LOCATION: US ◦ Merrill Lynch ETF Account (Owner: SP) LOCATION: US ◦ Merrill Lynch MA Account (Owner: SP) LOCATION: US
--

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. Mike Carey , 08/18/2026