



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Daniel Jay O'Connor Jr  
**Status:** Congressional Candidate  
**State/District:** OH12

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2021  
**Filing Date:** 05/17/2021

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Amazon.com, Inc. (AMZN) [ST]		\$1,001 - \$15,000	None		
American Funds New World R6 [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Apple Inc. (AAPL) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
BlackRock MSCI ACWI ex-US IMI Index Fd E [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brookfield Renewable Partners L.P. (BEP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Business Checking [BA]	JT	\$15,001 - \$50,000	None		
Celsion Corporation (CLSN) [ST]		\$1 - \$1,000	None		
Chase Checking [BA]	JT	\$15,001 - \$50,000	None		
Commodity Index Daily Fund E [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Developed Real Estate Index Fund E [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
General Mills, Inc. (GIS) [ST]		\$1,001 - \$15,000	None		
International Business Machines Corporation (IBM) [ST]		\$1,001 - \$15,000	None		
iShares Dow Jones U.S. ETF (IYY) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Loomis Sayles Global Allocation N [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Marcus Savings [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Mljet Holdings LLC [OL]		Undetermined	Distributions	\$2,501 - \$5,000	\$5,001 - \$15,000
LOCATION: Columbus, Franklin, OH, US DESCRIPTION: LLC that is used for rental property located in Rockbridge, OH.					
Netflix, Inc. (NFLX) [ST]		\$1,001 - \$15,000	None		
Norwegian Cruise Line Holdings Ltd. Ordinary Shares (NCLH) [ST]		\$1 - \$1,000	None		
O'Connor, Haseley, and Wilhelm [OL]		Undetermined	Distributions	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Columbus, Franklin, OH, US DESCRIPTION: Law firm partnership.					
OPERS Pension [PE]		\$15,001 - \$50,000	None		
OpGen, Inc. (OPGN) [ST]		\$1 - \$1,000	Capital Gains	None	\$1,001 - \$2,500
Personal Residence [RP]	JT	\$250,001 - \$500,000	None		
LOCATION: Columbus, Franklin, OH, US					
Rental Property [RP]	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Rockbridge, Hocking, OH, US					
Rental Property [RP]		\$100,001 -	Rent	None	\$5,001 -

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
		\$250,000			\$15,000
LOCATION: Columbus, Franklin, OH, US					
Rosetta Genomics [EF]		\$1 - \$1,000	None		
Russell 1000 Index Fund [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Russell 2000 Index Fund [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Salesforce.com Inc (CRM) [ST]		\$1 - \$1,000	None		
Target Corporation (TGT) [ST]		\$1,001 - \$15,000	None		
U.S. Debt Index Fund E [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
U.S. TIPS Fund E [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Div Appreciation ETF (VIG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Energy ETF (VDE) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1,001 - \$2,500
Vanguard FTSE Emerging Markets ETF (VWO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Growth ETF (VUG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Growth Index Adm [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Vanguard Mid-Cap Value Index Adm [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Vanguard S&P 500 ETF (VOO) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Vanguard Small-Cap Value ETF (VBR) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Vanguard Small-Cap Value Index Adm [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Vanguard Total International Stock ETF (VXUS)		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[ST]					
Vanguard Total Stock Market ETF (VTI) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1 - \$200	\$5,001 - \$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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Franklin County Ohio	Salary	\$41,419.00	\$76,106.00
Wright State University	Adjunct Salary		\$3,000.00
Search 2 Close Title Company	Spouse Salary	\$69,750.00	\$3,656.00
First American Financial	Spouse Salary	\$4,000.00	\$113,732.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Barclays	January 2021	Credit Card	\$10,000 - \$15,000
	Equity Resources	September 2020	Rental Property Mortgage	\$250,001 - \$500,000
	First Commonwealth Bank	September 2020	Personal Residential Mortgage	\$100,001 - \$250,000
	Federal Student Loans	2008	Spouse Student Loans	\$100,001 - \$250,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Recorder	Franklin County
Partner	O'Connor, Haseley and Wilhelm
Partner	Mljet Holdings LLC

### SCHEDULE F: AGREEMENTS

None disclosed.

### **SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

### **EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**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:** Daniel Jay O'Connor Jr, 05/17/2021