

United States Senate

Financial Disclosures

New Filer Report for 01/21/2025

Mr. Jon A Husted (Husted, Jon A.)

 **Filed 05/21/2025 @ 6:44 AM**

The following statements were checked before filing:

- ☒ I certify that the statements I have made on this form are true, complete and correct to the best of my knowledge and belief.
 - ☒ I understand that reports cannot be edited once filed. To make corrections, I will submit an *electronic* amendment to this report.
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☐ I *omitted* assets because they meet the three-part test for exemption.

Part 1. Honoraria Payments or Payments to Charity in Lieu of Honoraria

Did any individual or organization pay you or your spouse more than \$200, or donate any amount to a charity on your or your spouse's behalf, for an article, speech, or appearance? **No**

Part 2. Earned and Non-Investment Income

Did you or your spouse have reportable earned income or non-investment income? **Yes**

#	Who Was Paid	Type	Who Paid	Amount Paid	Comments
1	Spouse	Commissions	Street Sotheby's International Realty Columbus, OH	> \$1,000	n/a
2	Self	Salary	State of Ohio Columbus, OH	\$221,125.17	n/a
3	Self	Board Compensation	Heartland Bank Columbus, OH	\$27,575.00	n/a
4	Spouse	Salary	A.R.T. Squared Columbus, OH	> \$1,000	n/a
5	Spouse	Wages	Upper Arlington City School District Upper Arlington, OH	> \$1,000	n/a

Part 3. Assets

Did you, your spouse, or dependent child own any asset that had a value of more than \$1,000 or generated income of more than \$200? **Yes**

	Asset	Asset Type	Owner	Value	Income Type	Income
1	Heartland Bank (Columbus, OH) <i>Type:</i> Checking, Savings,	Bank Deposit	Joint	\$100,001 - \$250,000	Interest,	\$5,001 - \$15,000
2	NWS Investors I LLC <i>Company:</i> NWS Investors I LLC (Columbus, OH) <i>Description:</i> Title company small percentage investment	Business Entity Limited Liability Company (LLC)	Spouse	None (or less than \$1,001)	Dividends,	\$1,001 - \$2,500
3	Caliber Title Holding, LLC <i>Company:</i> Caliber Title Holding, LLC (Columbus, OH) <i>Description:</i> Small percentage title company investment	Business Entity Limited Liability Company (LLC)	Spouse	None (or less than \$1,001)	Dividends,	\$2,501 - \$5,000
4	GDR Concepts I, LLC <i>Company:</i> G.D. Ritzy's Restaurant (Columbus, OH) <i>Description:</i> Small percentage restaurant investment	Business Entity Limited Liability Company (LLC)	Spouse	\$1,001 - \$15,000	Dividends, Interest,	\$2,501 - \$5,000
5	Ohio 529 Account <i>Institution:</i> College Advantage	Education Savings Plans 529 College Savings Plan	Spouse			
5.1	Vanguard Ohio Target Enrollment 2028/2029	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Dividends, Interest, Capital Gains,	None (or less than \$201)
5.2	Vanguard Ohio Target Enrollment 2024/2025	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	None,	None (or less than \$201)
6	Commonwealth Brokerage Account	Brokerage/Managed Account	Spouse			
6.1	FBKWX - Fidelity Advisor Total Bond Fund Class Z	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	\$201 - \$1,000
6.2	Fidelity Money Market Premium	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Interest,	\$201 - \$1,000

	Asset	Asset Type	Owner	Value	Income Type	Income
6.3	John Hancock Funds Disciplined Value Fund Class I	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	\$1,001 - \$2,500
6.4	JPMorgan Core Bond Fund Class I	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	\$201 - \$1,000
6.5	<u>MFEIX</u> - MFS Growth Fund Class I	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	\$2,501 - \$5,000
6.6	<u>PIFZX</u> - PGIM Short-Term Corporate Bond Fund Class Z	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
6.7	<u>TROSX</u> - T. Rowe Price Overseas Stock Fund	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
6.8	<u>TMCPX</u> - Touchstone Midcap Fund Class Y	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	\$201 - \$1,000
6.9	<u>BEXIX</u> - Baron Emerging Markets Fd Inst Shs	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
6.10	<u>FBMS</u> - First Bancshares, Inc.	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	\$1,001 - \$2,500
7	Commonwealth Roth IRA	Retirement Plans IRA	Spouse			
7.1	<u>GWPEX</u> - American Funds Growth Portfolio Class F-2	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
7.2	<u>FVD</u> - First Trust VL Dividend	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
7.3	<u>WOBDX</u> - Jpmorgan Core Bond Fund I Class	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
8	Commonwealth SEP IRA	Retirement Plans IRA	Spouse			

	Asset	Asset Type	Owner	Value	Income Type	Income
8.1	QQQ - Invesco QQQ Trust, Series 1	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	Dividends, Capital Gains,	None (or less than \$201)
8.2	American Beacon Small Cap Value Fund CI R5	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
8.3	FBKWX - Fidelity Advisor Total Bond Fund Class Z	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
8.4	Fidelity Cons Income Bond CI Z	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
8.5	First Trust Value Line Div Index Fund	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Dividends, Capital Gains,	None (or less than \$201)
8.6	FPNIX - Fpa New Income Institutional Class	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
8.7	Harding Loeyner Institutional Em Mkts Portfolio CI I	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
8.8	WOBDX - Jpmorgan Core Bond Fund I Class	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
8.9	MCVIX - MFS Mid Cap Value Fund - Class I	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
8.10	PIFZX - PGIM Short-Term Corporate Bond Fund Class Z	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
8.11	TROIX - T. Rowe Price Overseas Stock Fund - I Class	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
8.12	TMCPX - Touchstone Midcap Fund Class Y	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
8.13	<u>MISIX</u> - Victory Trivalent International Small-Cap Cl I	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
8.14	<u>WIAEX</u> - Wasatch Small Cap Growth Fund Instl Cl	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
8.15	<u>GABC</u> - German American Bancorp, Inc. - Common Stock	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
8.16	<u>INTC</u> - Intel Corporation - Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
9	Commonwealth IRA	Retirement Plans IRA	Self			
9.1	<u>FBKWX</u> - Fidelity Advisor Total Bond Fund Class Z	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
9.2	Fidelity Conservative Income Bond Cl Z	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
9.3	Fidelity Money Market Premium	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Interest,	None (or less than \$201)
9.4	First Trust Value Line Dividend Index Fund	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Dividends, Capital Gains,	None (or less than \$201)
9.5	<u>GABC</u> - German American Bancorp, Inc. - Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
9.6	<u>GTSCX</u> - Glenmede Small Capitalization Equity Portfolio I	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
9.7	Invesco Oppenheimer International Growth Cl Y	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
9.8	<u>WOBDX</u> - Jpmorgan Core Bond Fund I Class	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
9.9	<u>MFEIX</u> - MFS Growth Fund Class I	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Dividends, Capital Gains,	None (or less than \$201)
9.10	<u>OAYIX</u> - Oakmark International Fund Advisor Class	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
9.11	<u>PDGIX</u> - T. Rowe Price Dividend Growth Fund - I Class	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
9.12	<u>TEGYX</u> - Touchstone Mid Cap Growth Class Y	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
9.13	<u>WICVX</u> - Wasatch Small Cap Value Fund Institutional Class	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
10	Commonwealth SEP IRA	Retirement Plans IRA	Self			
10.1	Fidelity Conservative Income Bond Fund CI Z	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	Dividends, Capital Gains,	None (or less than \$201)
10.2	<u>FSGGX</u> - Fidelity Global Ex U.S. Index Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
10.3	<u>FSPGX</u> - Fidelity Large Cap Growth Index Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
10.4	<u>FLCOX</u> - Fidelity Large Cap Value Index Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
10.5	<u>FSMDX</u> - Fidelity Mid Cap Index Fund	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	Dividends, Capital Gains,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
10.6	FSSNX - Fidelity Small Cap Index Fund	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	Dividends, Capital Gains,	None (or less than \$201)
10.7	FXNAX - Fidelity U.S. Bond Index Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Dividends, Capital Gains,	\$1,001 - \$2,500
11	A.R.T. Squared LLC <i>Company:</i> A.R.T. Squared LLC (Columbus, OH) <i>Description:</i> Art production and sales; athletic coaching.	Business Entity Limited Liability Company (LLC)	Spouse	\$1,001 - \$15,000	Other, (Ordinary business income)	\$5,001 - \$15,000 Other \$5,001.00
12	Ohio 457 Deferred Compensation Account	Deferred Compensation Deferred Compensation - Other	Self			
12.1	LifePath Index 2035 Fund N	Mutual Funds Mutual Fund	Self	\$250,001 - \$500,000	Dividends, Interest, Capital Gains,	None (or less than \$201)
12.2	Vanguard Capital Opportunity Fund	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Dividends, Capital Gains,	None (or less than \$201)
12.3	Fidelity Contrafund CP	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
12.4	US Large Company Stock Index	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Dividends, Capital Gains,	None (or less than \$201)
12.5	Fidelity Contrafund CP	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
12.6	Non-US Company Stock Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
13	Noxsano Series A-1 Preferred Stock <i>Company:</i> Noxsano Inc. (Columbus, OH) <i>Description:</i> Medical innovation company focused on wound care	Corporate Securities Non-Public Stock	Spouse	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)

Part 4a. Periodic Transaction Report Summary

Part 4b. Transactions

Not required

Part 5. Gifts

Not required

Part 6. Travel

Not required

Part 7. Liabilities

Did you, your spouse, or dependent child have a reportable, non-revolving charge account liability worth more than \$10,000 at any time or a revolving charge account whose value exceeded \$10,000 as of the last day of the reporting period? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2022	Self	Home Equity Line of Credit	-	8.5% (on demand)	\$100,001 - \$250,000	Heartland Bank (now German American Bank) Upper Arlington, OH	HELOC with balance ranging from 0 to \$100,809.96, paid in full and closed on 3/22/24.

Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **Yes**

#	Position Dates	Position Held	Entity	Entity Type	Comments
1	Jan 2024 to present	Trustee	Jon Husted Trust Columbus, OH	Trust	n/a
2	Aug 2021 to Jan 2025	Other (Member)	Ohio Broadband Expansion Program Authority Columbus, OH	Other (Government)	n/a
3	Jan 2019 to Jan 2025	Other (Lieutenant Governor)	State of Ohio Columbus, OH	Other (Government)	n/a
4	May 2022 to Jan 2025	Director	Heartland Bank Columbus, OH	Corporation	n/a
5	Jan 2019 to Jan 2025	Director	Innovate Ohio Columbus, OH	Other (Government)	n/a
6	Jan 2019 to Jan 2025	Director	Governor's Office of Workforce Transformation Columbus, OH	Other (Government)	n/a
7	Sep 2021 to Jan 2025	Other (Chair of Advisory Committee)	Cincinnati Innovation District Advisory Committee Cincinnati, OH	Other (Committee)	n/a

Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **Yes**

#	Date	Parties Involved	Type	Status and Terms	Comments
1	Jan 2019	State of Ohio Columbus, OH	Continuing participation in an employee benefit plan	Continued investment in Ohio Public Employees Deferred Compensation Program. Neither I nor my former employer contribute to this plan.	n/a

Part 10. Compensation

Only required if you are a candidate or this is your first report: Did any person or entity pay more than \$5,000 to you or for services provided by you? **No**

Attachments & Comments

No attachments added.

No comments added.