



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Robert E. Latta  
**Status:** Member  
**State/District:** OH05

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 05/03/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
American Bond Fund of America [MF] DESCRIPTION: asset sold 7/12/2024	SP	None	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
American Capital Income Builder [MF] DESCRIPTION: asset sold 7/12/2024	SP	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
American Funds American Balanced [MF] DESCRIPTION: fund sold on 7/12/2024	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
American Funds American Mutual [MF] DESCRIPTION: fund sold on 7/12/2024	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
American Funds Infit Linked Bond [MF] DESCRIPTION: fund sold on 7/12/2024	SP	None	None		<input checked="" type="checkbox"/>
American Global Balanced [MF] DESCRIPTION: fund sold on 7/12/2024	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
American Income Fund of America [MF]	SP	None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: fund sold on 7/12/2024					
American Strategic Bond Fund [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: fund sold on 7/12/2024					
American US Govt Securities Fund [MF]	SP	None	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: fund sold on 7/12/2024					
Brighthouse Life Insurance Company (FN) [FN]		\$1 - \$1,000	None		<input type="checkbox"/>
DESCRIPTION: This is a traditional pension and the income is reported on Schedule C.					
Buckeye State Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Buckeye State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Buckeye State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Civista Bank fka Henry County Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Civista Bank fka Henry County Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Eaton Vance Emerging Markets Local Income Fd Cl A (EEIAX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
EuroPacific Growth Fund Cl R-6 (RERGX) [MF]	SP	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Farmers & Merchants Bancorp, Inc. (FMAO) [ST]	SP	\$100,001 - \$250,000	Dividends, received stock for income as director	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: receiving partial compensation in stock					
Farmers & Merchants State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Farmers & Merchants State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Farmers & Merchants State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Farmers & Merchants State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Farmers & Merchants State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Farmers & Merchants State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Farmers & Merchants State Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Farmers & Merchants State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Farmers and Merchants State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Farmers and Merchants State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Farmers and Merchants State Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity 500 Index Fund Premium, Formerly known as Spartan 500 Index Fund [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Asset Manager 50% [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Blue Chip [MF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Blue Chip [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Contrafund [MF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Equity Dividend Income Fund formerly Fidelity Equity Income II [MF]	JT	\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Fidelity Equity Dividend Income Fund formerly Fidelity Equity Income II [MF]		\$100,001 - \$250,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Fund [MF]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
Fidelity Govt Cash Reserves [BA]	SP	None	Interest	\$1 - \$200	<input type="checkbox"/>
Fidelity Growth and Income [MF]	JT	\$50,001 - \$100,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Low Priced Stock [MF]	JT	\$500,001 - \$1,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Nasdaq Composite Index [MF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity OTC Port [MF]	JT	\$50,001 - \$100,000	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Puritan [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Puritan [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Total Market Index Fund [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Value [MF]		\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fifth Third Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Fifth Third Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Fifth Third Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Fifth Third Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Fifth Third Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Genoa Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Genoa Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Genoa Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Genoa Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Genoa Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Genoa Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Huntington National Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Huntington National Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Huntington National Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Huntington National Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Huntington National Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
KeyBank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
KeyBank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
KeyBank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
KeyBank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
New Perspective Fund, Class R-6 Shares (RNPGX) [MF]	SP	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Ohio Public Employees Retirement System-deferred benefits plan not self-directed (PE) [PE]		Undetermined	None		<input type="checkbox"/>
Ohio Public Employees Retirement System-deferred benefits plan not self-directed (PE)(PE) [PE]	SP	Undetermined	None		<input type="checkbox"/>
PIMCO Funds High Yield Fund Institutional Shares (PHIYX) [MF]	SP	\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
PIMCO Inter BD (USH) Inst [OT]	SP	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Mutual Fund. Asset not found under asset name selection above. PFORX					
PNC Bank [BA]		None	Interest	\$201 - \$1,000	<input type="checkbox"/>
PNC Bank [BA]		None	Interest	\$201 - \$1,000	<input type="checkbox"/>
Premier Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Premier Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Premier Bank fka First Federal Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Premier Bank fka First Federal Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Premier Bank fka First Federal Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Premier Bank fka First Federal Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Premier Bank fka First Federal Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Premier Bank fka First Federal Bank [BA]	JT	\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Premier Bank fka First Federal Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Premier Bank fka First Federal Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
State Bank [BA]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
State Bank [BA]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
TIAA Traditional [FN]	SP	\$250,001 - \$500,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: .					
Union Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Union Bank [BA]	JT	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Union Bank [BA]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Vanguard 500 Index Fund Admiral [MF]	JT	\$500,001 - \$1,000,000	Dividends	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Vanguard Institutional Index Fund [OT]	SP	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: Mutual Fund. Asset not found under asset name selection above. VINIX					
Vanguard Small Cap GR IDX Admiral [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Vanguard Small Index Adm [OT]	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Mutual fund. Asset not found under asset name selection above. VSMAX					
Vanguard Total Stock Mkt Indx Inv [MF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

\* 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?
Farmers & Merchants Bancorp, Inc. (FMAO) [ST] DESCRIPTION: dividend reinvestment	SP	01/22/2024	P	\$1,001 - \$15,000	
Farmers & Merchants Bancorp, Inc. (FMAO) [ST] DESCRIPTION: dividend reinvestment	SP	04/20/2024	P	\$1,001 - \$15,000	
Farmers & Merchants Bancorp, Inc. (FMAO) [ST] DESCRIPTION: Dividends, received stock for partial compensation as director	SP	06/09/2024	P	\$15,001 - \$50,000	
Farmers & Merchants Bancorp, Inc. (FMAO) [ST] DESCRIPTION: dividend reinvestment	SP	07/20/2024	P	\$1,001 - \$15,000	
Farmers & Merchants Bancorp, Inc. (FMAO) [ST] DESCRIPTION: dividend reinvestment	SP	10/20/2024	P	\$1,001 - \$15,000	
American Bond Fund of America (MF) [OT] LOCATION: US DESCRIPTION: mutual fund	SP	07/12/2024	S	\$50,001 - \$100,000	<input type="checkbox"/>
American Capital Income Builder (MF) [OT] LOCATION: US DESCRIPTION: mutual fund	SP	07/12/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
American EuroPac Grw R6, 100 Interest (MF) [OT] LOCATION: US DESCRIPTION: mutual fund	SP	07/12/2024	P	\$1,001 - \$15,000	
American Funds New Persp R6 (MF) [OT] LOCATION: US DESCRIPTION: mutual fund	SP	07/12/2024	P	\$1,001 - \$15,000	
American Funds American Balanced (MF) [OT] LOCATION: US DESCRIPTION: mutual fund	SP	07/12/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
American Funds American Mutual (MF) [OT] LOCATION: US	SP	07/12/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DESCRIPTION: mutual fund					
American Funds Inflt Linked Bond (MF) [OT]	SP	07/12/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: mutual fund					
American Global Balanced (MF) [OT]	SP	07/12/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: mutual fund					
American Income Fund of America (MF) [OT]	SP	07/12/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
LOCATION: US DESCRIPTION: mutual fund					
American Strategic Bond Fund (MF) [OT]	SP	07/12/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: mutual fund sale					
Fidelity 500 Index Fund Premium (MF) [OT]	JT	Monthly	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: Mutual fund					
Fidelity Asset Manager 50% [OT]	JT	Monthly	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: Mutual fund					
Fidelity Blue Chip (MF) [OT]	SP	Monthly	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: Mutual fund					
Fidelity Blue Chip (MF) [OT]	JT	Monthly	P	\$15,001 - \$50,000	
LOCATION: US DESCRIPTION: Mutual fund					
Fidelity Contrafund (MF) [OT]	JT	Monthly	P	\$1,001 - \$15,000	
LOCATION: US DESCRIPTION: Mutual fund					
Fidelity Equity Dividend Income Fund (MF) [OT]	JT	Monthly	P	\$15,001 - \$50,000	
LOCATION: US DESCRIPTION: Mutual fund					

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Equity Dividend Income Fund (MF) [OT] LOCATION: US DESCRIPTION: Mutual fund		Monthly	P	\$1,001 - \$15,000	
Fidelity Govt Cash Reserves [OT] LOCATION: US DESCRIPTION: Mutual fund	SP	Monthly	S	\$15,001 - \$50,000	<input type="checkbox"/>
Pimco High Yield Inst (MF) [OT] LOCATION: US DESCRIPTION: Mutual fund	SP	Quarterly	P	\$1,001 - \$15,000	
Pimco Inter BD (USH) Inst (MF) [OT] LOCATION: US DESCRIPTION: Mutual fund	SP	Quarterly	P	\$1,001 - \$15,000	
Vanguard 500 Index Fund Admiral [OT] LOCATION: US DESCRIPTION: Mutual fund	JT	Monthly	P	\$1,001 - \$15,000	
Vanguard Institutional Index Fund (MF) [OT] LOCATION: US DESCRIPTION: Mutual fund	SP	Quarterly	P	\$1,001 - \$15,000	
Vanguard Total Stock Mkt Indx Inv (MF) [OT] LOCATION: US DESCRIPTION: Mutual fund	JT	Monthly	P	\$1,001 - \$15,000	
American US Govt Securities Fund [OT] LOCATION: US DESCRIPTION: Mutual fund	SP	07/12/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>

\* 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
University of Findlay	spouse salary	N/A
Farmers & Merchants State Bank	spouse salary	N/A
COMMENTS: receiving stock for partial compensation		

Source	Type	Amount
Marcia Latta Strategies, consulting (Toledo Museum of Art)	spousal salary	N/A
Ohio Public Employees Retirement System COMMENTS: spouse retirement	spousal salary	N/A
Brighthouse Life Insurance	pension	\$409.80

## SCHEDULE D: LIABILITIES

None disclosed.

## SCHEDULE E: POSITIONS

None disclosed.

## SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2007	Ohio Public Employees Retirement System-deferred benefits plan not self-directed (PE) and Robert E. Latta	state pension fund
June 2021	Brighthouse Life Insurance Company and Robert E. Latta	fixed annuity

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

## 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

## **COMMENTS**

## **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. Robert E. Latta , 05/03/2025