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Annual Report for Calendar 2024

Mr. Andy Kim (Kim, Andy)

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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.
- 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	Salary	Vanguard Malvern, PA	> \$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	Bank of America (Washington, DC)	Bank Deposit	Joint	\$15,001	Interest,	None (or less than

	(Washington, DC) Type: Checking, Asset	Asset Type	Owner	\$50,000 Value	Income Type	less than \$201) Income
2	Bank of America (Washington, DC) Type: Savings,	Bank Deposit	Joint	\$1,001 - \$15,000	Interest,	None (or less than \$201)
3	Capital One (McLean, VA) Type: Savings,	Bank Deposit	Joint	\$100,001 - \$250,000	Interest,	\$1,001 - \$2,500
4	529 Institution: Merrill Edge 529	Education Savings Plans 529 College Savings Plan	Child			
4.1	BlackRock 2033 Enroll D	Mutual Funds Mutual Fund	Child	\$100,001 - \$250,000	None,	None (or less than \$201)
5	Vanguard 529 Institution: Vanguard	Education Savings Plans 529 College Savings Plan	Child			
5.1	Vanguard Target Enrollment 2034/2035 Portfolio	Mutual Funds Mutual Fund	Child	\$50,001 - \$100,000	None,	None (or less than \$201)
6	Vanguard Mutual Fund Brokerage Account	Brokerage/Managed Account	Joint			
6.1	VEA - FTSE Developed Markets Vanguard	Mutual Funds Exchange Traded Fund/Note	Joint	\$50,001 - \$100,000	Dividends, Capital Gains,	\$2,501 - \$5,000
6.2	VWO - Vanguard FTSE Emerging Markets ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$1,001 - \$15,000	Dividends, Capital Gains,	None (or less than \$201)
6.3	VXUS - Vanguard Total International Stock ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$15,001 - \$50,000	Dividends, Capital Gains,	None (or less than \$201)
6.4	VTI - Vanguard Total Stock Market ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Dividends, Capital Gains,	\$1,001 - \$2,500
7	T Rowe Price 401K	Retirement Plans Deferred Compensation	Spouse			
7.1	T Rowe Price Retire 2045 Tr A	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	None,	None (or less than \$201)

8	Structured Capital Strategies 16 Traditional IRA Asset	Retirement Plans IRA Asset Type	Self Owner	Value	Income Type	Income
8.1	Equitable <i>Provider: Equitable</i>	Annuity Variable Annuity	Self			
8.1.1	Equitable Structured Capital Strategies 16B NASDAQ 100 1 Year -10% Buffer <i>Provider: Equitable</i>	Annuity Fixed	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
8.1.2	Equitable Structured Capital Strategies S&P 500 1 Year -10% Buffer <i>Provider: Equitable</i>	Annuity Fixed	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
8.2	Equitable Russell 2000 Annual Lock 5 Year -10% Buffer <i>Provider: Equitable</i>	Annuity Fixed	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
8.3	Equitable S&P 500 Annual Lock 5 Year -10% Buffer <i>Provider: Equitable</i>	Annuity Fixed	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
9	Vanguard Retirement Account	Retirement Plans Deferred Compensation	Spouse			
9.1	VTSNX - Vanguard Total International Stock Index Fund IN <i>Filer comment: Tax-deferred</i>	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	None,	None (or less than \$201)
9.2	VBTIX - Vanguard Bond Index Fund Total Bond Mkt Index Fu <i>Filer comment: Tax-deferred</i>	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	None,	None (or less than \$201)
9.3	VITSX - Vanguard Index Trust Total Stock Market Index Fu <i>Filer comment: Tax-deferred</i>	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	None,	None (or less than \$201)
9.4	VTIFX - Vanguard Total International Bond Index Fd Inst <i>Filer comment: tax-deferred</i>	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	None,	None (or less than \$201)
10	Equitable BrightLife Level 20	Life Insurance Variable	Spouse			
10.1	Equitable Variable Annuity <i>Provider: Equitable</i>	Annuity Variable Annuity	Spouse			
10.1.1	Core 1 Year Russell 2000 Price Return Index <i>Provider: Equitable</i>	Annuity Fixed	Spouse	\$15,001 - \$50,000	None,	None (or less than \$201)
10.1.2	Core 1 Year S&P 500 Price Return Index <i>Provider: Equitable</i>	Annuity Fixed	Spouse	\$15,001 - \$50,000	None,	None (or less than \$201)

10.1.3	Core 3 Year S&P 500 Price Return Index Asset Provider: Equitable	Annuity Asset Type Fixed	Spouse Owner	\$15,001 Value -	Income None, Type	None (or Income less than \$201)
				\$50,000		\$201)
11	Health Equity Health Savings Account	Brokerage/Managed Account	Spouse			
11.1	VUIIX - Vanguard Institutional Index Fund Institutional	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
11.2	VBMPX - Vanguard Total Bond Market Insti Plus Shares	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
11.3	VTPSX - Vanguard Total Intl Stock Index Fund Inst Plus	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
11.4	VBIRX - Vanguard Short-Term Bond Index Fund Admiral Shar	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
11.5	VTINX - Vanguard Target Retirement Income Fund	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
11.6	VFORX - Vanguard Target Retirement 2040 Fund	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	None,	None (or less than \$201)

Part 4a. Periodic Transaction Report Summary

In this section, electronically filed periodic transaction report (PTR) transactions are displayed for you.

Part 4b. Transactions

Did you, your spouse, or dependent child buy, sell, or exchange an asset where the transaction exceeded \$1,000 and was not reported on Part 4a? **Yes**

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
1	Joint	VWIUX	Vanguard Intermediate-Term Tax-Exempt Fd Admiral	Sale (Full)	03/11/2024	\$15,001 - \$50,000	n/a
2	Joint	VEA	Vanguard FTSE	Purchase	03/11/2024	\$50,001 -	n/a

#	Owner	Ticker	Developed Markets ETF Asset Name	Transaction Type	Transaction Date	\$100,000 Amount	Comments
3	Joint	VWLUX	Vanguard Long-Term Tax-Exempt Fd Admiral Shs	Sale (Full)	03/11/2024	\$1,001 - \$15,000	n/a
4	Joint	VXUS	Vanguard Total International Stock ETF	Sale (Partial)	03/11/2024	\$15,001 - \$50,000	n/a
5	Joint	VWO	Vanguard FTSE Emerging Markets ETF	Purchase	03/11/2024	\$1,001 - \$15,000	n/a
6	Joint	VTI	Vanguard Total Stock Market ETF	Purchase	06/25/2024	\$1,001 - \$15,000	n/a
7	Joint	VTI	Vanguard Total Stock Market ETF	Purchase	07/05/2024	\$1,001 - \$15,000	n/a
8	Joint	VTI	Vanguard Total Stock Market ETF	Purchase	12/24/2024	\$1,001 - \$15,000	n/a
9	Joint	VMLUX	Vanguard Limited-Term Tax-Exempt Fd Admiral Shs	Sale (Full)	03/11/2024	\$1,001 - \$15,000	n/a
10	Joint	VEA	Vanguard FTSE Developed Markets ETF	Purchase	03/12/2024	\$1,001 - \$15,000	n/a
11	Spouse	VITPX	Vanguard Institutional Total Stock Market Index	Purchase	03/28/2024	\$1,001 - \$15,000	retirement plan contribution
12	Spouse	VBMPX	Vanguard Total Bond Market Insti Plus Shares	Sale (Partial)	10/04/2024	\$50,001 - \$100,000	mutual fund rebalancing
13	Spouse	VITPX	Vanguard Institutional Total Stock Market Index	Sale (Full)	10/04/2024	\$100,001 - \$250,000	Mutual fund rebalancing

14	Spouse Owner	VBMPX Ticker	Vanguard Total Bond Market Insti Plus Shares	Purchase	03/11/2024	\$50,001 Amount	mutual fund rebalancing Comments
						\$100,000	
15	Spouse	VITPX	Vanguard Institutional Total Stock Market Index	Purchase	03/11/2024	\$100,001 - \$250,000	mutual fund rebalancing
16	Spouse	VTIFX	Vanguard Total International Bond Index Fd Inst	Purchase	03/11/2024	\$15,001 - \$50,000	mutual fund rebalancing
17	Spouse	VITPX	Vanguard Institutional Total Stock Market Index	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
18	Spouse	VBMPX	Vanguard Total Bond Market Insti Plus Shares	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
19	Spouse	VITPX	Vanguard Institutional Total Stock Market Index	Sale (Partial)	06/24/2024	\$1,001 - \$15,000	mutual fund rebalancing
20	Spouse	VITPX	Vanguard Institutional Total Stock Market Index	Sale (Partial)	06/25/2024	\$1,001 - \$15,000	mutual fund rebalancing
21	Spouse	VITPX	Vanguard Institutional Total Stock Market Index	Purchase	06/28/2024	\$1,001 - \$15,000	n/a
22	Spouse	VITPX	Vanguard Institutional Total Stock Market Index	Purchase	09/30/2024	\$1,001 - \$15,000	n/a
23	Spouse	VBMPX	Vanguard Total Bond Market Insti Plus Shares	Purchase	09/30/2024	\$1,001 - \$15,000	n/a
24	Spouse	VTIVX	Vanguard Target Retirement 2045 Fund	Sale (Full)	03/11/2024	\$250,001 - \$500,000	n/a

#	Spouse Owner	TICKER	Target Fund Name	Purchase Type	Transaction Date	\$1,001 - \$15,000	n/a Comments
25	Spouse Owner	VTIVX	Vanguard Target Retirement 2045 Fund	Purchase	01/05/2024	\$1,001 - \$15,000	n/a
26	Spouse	VTSNX	Vanguard Total International Stock Index Fund IN	Purchase	03/11/2024	\$50,001 - \$100,000	n/a
27	Spouse	VITPX	Vanguard Institutional Total Stock Market Index	Sale (Partial)	07/05/2024	\$1,001 - \$15,000	n/a
28	Spouse	VITSX	Vanguard Index Trust Total Stock Market Index Fu	Purchase	12/31/2024	\$1,001 - \$15,000	n/a
29	Spouse	VBTIX	Vanguard Bond Index Fund Total Bond Mkt Index Fu	Purchase	12/31/2024	\$1,001 - \$15,000	n/a
30	Spouse	VTSNX	Vanguard Total International Stock Index Fund IN	Purchase	12/31/2024	\$1,001 - \$15,000	n/a
31	Spouse	VITSX	Vanguard Index Trust Total Stock Market Index Fu	Sale (Partial)	12/24/2024	\$1,001 - \$15,000	Mutal Fund Rebalancing
32	Spouse	VTSNX	Vanguard Total International Stock Index Fund IN	Purchase	12/24/2024	\$1,001 - \$15,000	n/a
33	Spouse	VITSX	Vanguard Index Trust Total Stock Market Index Fu	Sale (Partial)	12/23/2024	\$1,001 - \$15,000	n/a
34	Spouse	VITSX	Vanguard Index Trust Total Stock Market Index	Sale (Partial)	12/12/2024	\$1,001 - \$15,000	Mutual Fund Rebalancing

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
35	Spouse	VITSX	Vanguard Index Trust Total Stock Market Index Fu	Sale (Partial)	12/05/2024	\$1,001 - \$15,000	mutual fund rebalancing
36	Spouse	VTSNX	Vanguard Total International Stock Index Fund IN	Purchase	10/04/2024	\$50,001 - \$100,000	mutual fund rebalancing
37	Spouse	VBTIX	Vanguard Bond Index Fund Total Bond Mkt Index Fu	Purchase	10/04/2024	\$50,001 - \$100,000	mutual fund rebalancing
38	Spouse	VITSX	Vanguard Index Trust Total Stock Market Index Fu	Purchase	10/04/2024	\$100,001 - \$250,000	n/a

Part 5. Gifts

Did you, your spouse, or dependent child receive any reportable gift during the reporting period? **No**

Part 6. Travel

Did you, your spouse, or dependent child receive any reportable travel? **No**

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	2015	Joint	Mortgage	None	3% (30 years)	\$250,001 - \$500,000	Valon Phoenix, AZ	n/a
2	2019	Joint	Mortgage	None	3% (30 years)	\$250,001 - \$500,000	Mr Cooper Dallas, Texas	n/a

Part 8. Positions

Did you hold any reportable outside positions during the reporting period? **No**

Part 9. Agreements

Did you have any reportable agreement or arrangement with an outside entity? **No**

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.