



Filing ID #10066161

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Rebecca 'Becca' Balint
Status: Member
State/District: VToo

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2024
Filing Date: 05/06/2025

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Arc Benders Circus Opera LLC [OL]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
LOCATION: Brattleboro, VT, US DESCRIPTION: Consulting services					
Brattleboro Savings & Loan [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
The Girl in the Yellow Pantsuit: Essays on Politics, History, and Culture [IP]		Undetermined	None		<input type="checkbox"/>
Vermont State Teachers Pension [PE]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Bank Deposit Sweep Program [BA]	JT	\$1,001 - \$15,000	None		<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Boston Trust Midcap Fund (BTMFX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Calvert Conservative Allocation Fund Class I (CFAIX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Calvert Emerging Markets Equity Fund Class I (CVMIX) [MF]					
Balint & Wohl- Joint WROS ⇒ Calvert Flexible Bond Fund Class I (CUBIX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Ecofin Global Renewables Infrastructure Fund Institutional Class (ECOIX) [MF]	JT	None	None		<input checked="" type="checkbox"/>
DESCRIPTION: Overall loss in 2024					
Balint & Wohl- Joint WROS ⇒ Invesco Floating Rate ESG Fund Class Y (AFRYX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ iShares USD Green Bond ETF (BGRN) [EF]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Neuberger Berman Core Bond Institutional Class (NCRLX) [MF]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Nuveen ESG Large-Cap Growth ETF (NULG) [EF]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Praxis Value Index Fund, Class A Shares (MVIAX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ TCW New America Premier Equities Fund - N Class (TGUNX) [MF]	JT	None	Capital Gains	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Trillium ESG Global Equity Fund Investor (PORTX) [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DC 1 Education Trust ⇒ American Beacon Small Cap Value Fd Inst Cl (AVFIX) [MF]	DC	\$1 - \$1,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DC 1 Education Trust ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 1 Education Trust ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 1 Education Trust ⇒ John Hancock Fds III Disciplined Value Fund Class I (JVLIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DC 1 Education Trust ⇒ JPMorgan Core Bond Fund I Class (WOBDX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DC 1 Education Trust ⇒ MFS Growth Fund Class I (MFEIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
DC 1 Education Trust ⇒ MFS Mid Cap Value Fund - Class I (MCVIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 1 Education Trust ⇒ T. Rowe Price Overseas Stock Fund - I Class (TROIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 1 Education Trust ⇒ Touchstone Mid Cap Growth Class Y (TEGYX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DC 2 Education Trust ⇒ American Beacon Small Cap Value Fd Inst Cl (AVFIX) [MF]	DC	\$1 - \$1,000	None		<input type="checkbox"/>
DC 2 Education Trust ⇒ Baron Emerging Markets Fd Inst Shs (BEXIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 2 Education Trust ⇒ Eaton Vance Income Fd of Boston Insti Shs (EIBIX) [MF]	DC	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 2 Education Trust ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
DC 2 Education Trust ⇒ John Hancock Fds III Disciplined Value Fund Class I (JVLIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
DC 2 Education Trust ⇒ JPMorgan Core Bond Fund I Class (WOBDX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DC 2 Education Trust ⇒ MFS Growth Fund Class I (MFEIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
DC 2 Education Trust ⇒ MFS Mid Cap Value Fund - Class I (MCVIX) [MF]	DC	\$1,001 - \$15,000	None		<input type="checkbox"/>
DC 2 Education Trust ⇒ T. Rowe Price Overseas Stock Fund - I Class (TROIX) [MF]	DC	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Advisory Retirement Sweep Program [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Boston Trust Midcap Fund (BTMFX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒ Calvert Conservative Allocation Fund Class I (CFAIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Calvert Emerging Markets Equity Fund Class I (CVMIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Calvert Flexible Bond Fund Class I (CUBIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Ecofin Global Renewables Infrastructure Fund Institutional Class (ECOIX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒ Invesco Floating Rate ESG Fund Class Y (AFRYX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ iShares USD Green Bond ETF (BGRN) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Neuberger Berman Core Bond Institutional Class (NCRLX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Elizabeth Wohl IRA ⇒ Nuveen ESG Large-Cap Growth ETF (NULG) [EF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒ Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒ Praxis Value Index Fund, Class A Shares (MVIAX) [MF]	SP	\$50,001 - \$100,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒ TCW New America Premier Equities Fund - N Class (TGUNX) [MF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl IRA ⇒ Trillium ESG Global Equity Fund Investor (PORTX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Boston Trust Walden Small Cap Fund (BOSOX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Calvert Green Bond Fund Class I (CGBIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Calvert U.S. Large Cap Value Responsible Index Fund Class I (CFJIX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Goldman Sachs International Equity ESG Fund - Institutional Shares (GSIEX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Hartford Schroders Emerging Markets Equity Fund Class Y (HHHYX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ iShares ESG Aware MSCI EAFAE ETF (ESGD) [EF]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Elizabeth Wohl Roth IRA ⇒ Nuveen Core Impact Bond Fund R6 (TSBIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
DESCRIPTION: Formerly reported as TIAA-CREF Core Impact Bond Instl (TSBIX)					
Elizabeth Wohl Roth IRA ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Parnassus Mid Cap Fund - Institutional Shares (PFPMX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ PIMCO Low Duration ESG Fund Institutional Class (PLDIX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ RBC BlueBay High Yield Bond Fund Class I (RGHYX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity Inc. 401k ⇒ Fidelity Freedom 2040 (FFFFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial - Brattleboro Retreat 403(b) ⇒ Fidelity Aggressive International Fund (FIVFX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Previously held					
Lincoln Financial - Brattleboro Retreat 403(b) ⇒ JPMorgan Small Cap Value A (PSOAX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Previously Held					
Lincoln Financial - Brattleboro Retreat 403(b) ⇒ T. Rowe Price Retirement 2040 Fund (TRRDX) [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Previously Held					
Lincoln Financial - Brattleboro Retreat 403(b) ⇒ Vanguard Short-Term Bond Index Fund Admiral Shares (VBIRX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Previously held					
Rebecca Balint IRA ⇒ Fidelity Advisor Conservative Income Bond Fund - Class Z (FCNYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Appreciated over \$1,000					
Rebecca Balint IRA ⇒ Fidelity Global ex U.S. Index Fund (FSGGX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rebecca Balint IRA ⇒ Fidelity Large Cap Growth Index Fund (FSPGX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint IRA ⇒ Fidelity Large Cap Value Index Fund (FLCOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint IRA ⇒ Fidelity Mid Cap Index Fund (FSMDX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint IRA ⇒ Fidelity Small Cap Index Fund (FSSNX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint IRA ⇒ Fidelity U.S. Bond Index Fund (FXNAX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Boston Trust Walden Small Cap Fund (BOSOX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Calvert Green Bond Fund Class I (CGBIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Calvert U.S. Large Cap Value Responsible Index Fund Class I (CFJIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Goldman Sachs International Equity ESG Fund - Institutional Shares (GSIEX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Hartford Schroders Emerging Markets Equity Fund Class Y (HHHYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		None		Tax-Deferred	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Rebecca Balint Roth IRA ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Parnassus Mid Cap Fund - Institutional Shares (PFPMX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ PIMCO Low Duration ESG Fund Institutional Class (PLDIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ RBC BlueBay High Yield Bond Fund Class I (RGHYX) [MF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ TIAA-CREF Core Impact Bond Instl (TSBIX) [OT]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Mutual Fund					
VHEIP 529 Plan ⇒ Age 12-13 [5F]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
LOCATION: VT					
VHEIP 529 Plan ⇒ Age 14 [5F]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
LOCATION: VT					
VHEIP 529 Plan ⇒ Age 16 [5F]	SP	None	Tax-Deferred		<input checked="" type="checkbox"/>
LOCATION: VT					
VHEIP 529 Plan ⇒ Age 17 [5F]	SP	\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
LOCATION: VT					

* 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?
VHEIP 529 Plan ⇒ Age 16 [5F]	SP	11/25/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
LOCATION: VT					
VHEIP 529 Plan ⇒ Age 17 [5F]	SP	11/25/2024	P	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: VT					
Elizabeth Wohl IRA ⇒ Ecofin Global Renewables Infrastructure Fund - Institutional Class (ECOIX) [MF]	SP	05/13/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ TCW New America Premier Equities Fund - N Class (TGUNX) [MF]	SP	05/13/2024	S	\$50,001 - \$100,000	<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Nuveen ESG Large-Cap Growth ETF (NULG) [EF]	SP	05/13/2024	P	\$15,001 - \$50,000	<input type="checkbox"/>
Elizabeth Wohl IRA ⇒ Nuveen ESG Large-Cap Growth ETF (NULG) [EF]	SP	05/16/2024	P	\$50,001 - \$100,000	<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Boston Trust Walden Small Cap Fund (BOSOX) [MF]	SP	04/30/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]	SP	04/30/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]	SP	04/30/2024	P	\$1,001 - \$15,000	<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	SP	01/31/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Nuveen Core Impact Bond Fund R6 (TSBIX) [MF]	SP	04/30/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]	SP	04/30/2024	P	\$1,001 - \$15,000	<input type="checkbox"/>
Elizabeth Wohl Roth IRA ⇒ Parnassus Mid Cap Fund - Institutional Shares (PFPMX) [MF]	SP	04/30/2024	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Elizabeth Wohl Roth IRA ⇒ PIMCO Low Duration ESG Fund Institutional Class (PLDIX) [MF]	SP	04/30/2024	P	\$1,001 - \$15,000	
Elizabeth Wohl Roth IRA ⇒ Goldman Sachs International Equity ESG Fund - Institutional Shares (GSIEX) [MF]	SP	01/31/2024	P	\$1,001 - \$15,000	
VHEIP 529 Plan ⇒ Age 14 [5F]	SP	08/26/2024	P	\$15,001 - \$50,000	
LOCATION: VT					
VHEIP 529 Plan ⇒ Age 12-13 [5F]	SP	08/26/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: VT					
Rebecca Balint Roth IRA ⇒ Brown Advisory Sustainable Growth Fd Inst Shs (BAFWX) [MF]		12/13/2024	P	\$1,001 - \$15,000	
Rebecca Balint Roth IRA ⇒ Brown Advisory Sustainable Bond Fund - Institutional Shares (BAISX) [MF]		04/30/2024	P	\$1,001 - \$15,000	
Rebecca Balint Roth IRA ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]		01/31/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Rebecca Balint Roth IRA ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		12/06/2024	P	\$1,001 - \$15,000	
Rebecca Balint Roth IRA ⇒ Parnassus Core Equity Fund-Institutional Shares (PRILX) [MF]		04/30/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF]	JT	12/06/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF]	JT	09/04/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF]	JT	05/10/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒	JT	05/13/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
TCW New America Premier Equities Fund - N Class (TGUNX) [MF]					
Balint & Wohl- Joint WROS ⇒ Praxis Value Index Fund, Class A Shares (MVIAX) [MF]	JT	12/17/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Praxis Value Index Fund, Class A Shares (MVIAX) [MF]	JT	05/13/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Trillium ESG Global Equity Fund Investor (PORTX) [MF]	JT	12/11/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Trillium ESG Global Equity Fund Investor (PORTX) [MF]	JT	09/04/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Trillium ESG Global Equity Fund Investor (PORTX) [MF]	JT	05/10/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Boston Trust Midcap Fund (BTMFX) [MF]	JT	09/04/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Boston Trust Midcap Fund (BTMFX) [MF]	JT	05/10/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Neuberger Berman Core Bond Institutional Class (NCRLX) [MF]	JT	09/04/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Neuberger Berman Core Bond Institutional Class (NCRLX) [MF]	JT	05/10/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	JT	09/04/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ iShares ESG Aware MSCI EAFE ETF (ESGD) [EF]	JT	05/13/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Calvert Flexible Bond Fund Class I (CUBIX) [MF]	JT	09/04/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	JT	09/04/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Balint & Wohl- Joint WROS ⇒ Calvert Small Cap Fund Class I (CSVIX) [MF]	JT	05/13/2024	P	\$1,001 - \$15,000	
Rebecca Balint Roth IRA ⇒ Goldman Sachs International Equity ESG Fund - Institutional Shares (GSIEX) [MF]		01/31/2024	P	\$1,001 - \$15,000	
Elizabeth Wohl IRA ⇒ Boston Trust Midcap Fund (BTMFX) [MF]	SP	12/13/2024	P	\$1,001 - \$15,000	
Elizabeth Wohl IRA ⇒ Parnassus Core Equity Fund-Investor Shares (PRBLX) [MF]	SP	12/06/2024	P	\$1,001 - \$15,000	
Elizabeth Wohl IRA ⇒ Praxis Value Index Fund, Class A Shares (MVIAX) [MF]	SP	12/17/2024	P	\$1,001 - \$15,000	
Elizabeth Wohl IRA ⇒ Trillium ESG Global Equity Fund Investor (PORTX) [MF]	SP	12/11/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Ecofin Global Renewables Infrastructure Fund - Institutional Class (ECOIX) [MF]	JT	05/13/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Balint & Wohl- Joint WROS ⇒ Calvert Emerging Markets Equity Fund Class I (CVMIX) [MF]	JT	09/04/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Calvert Emerging Markets Equity Fund Class I (CVMIX) [MF]	JT	05/13/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ iShares USD Green Bond ETF (BGRN) [EF]	JT	09/04/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Nuveen ESG Large-Cap Growth ETF (NULG) [EF]	JT	09/04/2024	P	\$1,001 - \$15,000	
Balint & Wohl- Joint WROS ⇒ Nuveen ESG Large-Cap Growth ETF (NULG) [EF]	JT	05/13/2024	P	\$15,001 - \$50,000	

* 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
Brattleboro Retreat	Spouse Salary	N/A
Arc Benders Circus Opera LLC	Spouse self-employment income	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2019	Vermont State Teachers' Retirement System	Defined benefit plan that provides service retirement benefits.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Source	Trip Details				Inclusions		
	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
J Street Education Fund	02/17/2024	02/23/2024	Washington, DC - Tel Aviv - Hartford	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Fidelity Inc. 401k (Owner: SP)
- VHEIP 529 Plan (Owner: SP)
LOCATION: VT
DESCRIPTION: DC1
- VHEIP 529 Plan (Owner: SP)
LOCATION: VT
DESCRIPTION: DC2
- Rebecca Balint IRA
- Rebecca Balint Roth IRA

- Elizabeth Wohl IRA (Owner: SP)
- Elizabeth Wohl Roth IRA (Owner: SP)
- DC 1 Education Trust (Owner: DC)
- DC 2 Education Trust (Owner: DC)
- Balint & Wohl- Joint WROS (Owner: JT)
LOCATION: US
- Lincoln Financial - Brattleboro Retreat 403(b) (Owner: SP)

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. Rebecca 'Becca' Balint , 05/06/2025