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Annual Report for Calendar 2024

The Honorable Charles E Grassley (Grassley, Charles E.)

Filed 05/13/2025 @ 12:08 PM

Print Report

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	Retirement	Raymond James Trust Co NH Custodian IRA St Petersburg, FL	> \$1,000	n/a
2	Self	Retirement	Raymond James Trust Co NH Custodian SEP IRA St Petersburg, FL	\$43,851.76	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	Farmer's Cooperative Co. <i>Description:</i> Cooperative (Readlyn, Iowa) <i>Filer comment:</i> Value of asset is under reporting threshold. This asset will be removed on the 2025 report.	Farm	Joint	None (or less than \$1,001)	None, Dividends,	None (or less than \$201)
2	Landus Cooperative <i>Description:</i> Landus Cooperative (New Hartford, IA)	Farm	Joint	\$1,001 - \$15,000	Dividends,	\$201 - \$1,000
3	Grassley Family Farms, L.L.C. <i>Company:</i> Grassley Family Farms, L.L.C. (New Hartford, Iowa) <i>Description:</i> L.L.C. created to hold farmland owned by Senator Grassley	Business Entity Limited Liability Company (LLC)	Self			
3.1	Farmstead where Senator Grassley was born <i>Description:</i> Farmstead where Senator Grassley was born (New Hartford, IA) (New Hartford, IA)	Farm	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
3.2	Farmland - all located in Butler County, Iowa, Beaver Township <i>Description:</i> Sec. 24, Rng. 15-72 A (New Hartford, Iowa) (New Hartford, IA) <i>Filer comment:</i> Combined Income for all farmland. Income and cash rent.	Farm	Self	\$50,001 - \$100,000	Rent/Royalties,	\$100,001 - \$1,000,000
3.3	Farmland - all located in Butler County, Iowa, Beaver Township <i>Description:</i> Sec. 16, Rng. 15-118 A (New Hartford, IA) <i>Filer comment:</i> See 3.2 for Net Income for all farmland. Land being sold under long-term contract.	Farm	Self	\$100,001 - \$250,000	Rent/Royalties,	\$50,001 - \$100,000
3.4	Farmland - all located in Butler County, Iowa, Beaver Township <i>Description:</i> Sec. 16, Rng. 15-40 A (New Hartford, IA) <i>Filer comment:</i> See 3.3 for Net Income for all farmland being sold under long-term contract.	Farm	Self	\$100,001 - \$250,000	Rent/Royalties,	None (or less than \$201)
3.5	Farmland - all located in Butler County, Iowa, Beaver Township <i>Description:</i> Sec. 15, Rng. 15-43 A (New Hartford, IA) <i>Filer comment:</i> See 3.2 for Net Income for all farmland.	Farm	Self	\$50,001 - \$100,000	Rent/Royalties,	None (or less than \$201)
3.6	Farmland - all located in Butler County, Iowa, Beaver Township <i>Description:</i> Sec. 15, Rng. 15-87 A (New Hartford, IA) <i>Filer comment:</i> See 3.3 for Net Income for all farmland being sold under long-term contract.	Farm	Self	\$100,001 - \$250,000	Rent/Royalties,	None (or less than \$201)

	income for all farmland being sold under long-term contract.	Asset Type	Owner	Value	Income Type	Income
3.7	Farmland - all located in Butler County, Iowa, Beaver Township <i>Description: Sec. 34 & 35, Rng. 18-120 A (New Hartford, IA) Filer comment: See 3.2 for Net Income for all farmland.</i>	Farm	Self	\$100,001 - \$250,000	Rent/Royalties,	None (or less than \$201)
3.8	Farmland - all located in Butler County, Iowa, Beaver Township <i>Description: Sec. 34, Rng. 15-118 A (New Hartford, IA) Filer comment: See 3.2 for Net Income for all farmland.</i>	Farm	Self	\$100,001 - \$250,000	Rent/Royalties,	None (or less than \$201)
3.9	Farm Land-All located in Butler County, Iowa, Beaver Township <i>Description: Sec. 34, Rng. 15-114 A (New Hartford, IA) Filer comment: See 3.2 for Net Income for all farmland.</i>	Farm	Self	\$100,001 - \$250,000	Rent/Royalties,	None (or less than \$201)
4	Grandchildren 529 Account <i>Institution: Iowa-managed by Vanguard</i>	Education Savings Plans 529 College Savings Plan	Self			
4.1	Moderate Growth Aged Based 19 and Older Money Market	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
4.2	Conservative Income Portfolio	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
5	Grandchildren 529 College Savings <i>Institution: Iowa-managed by Vanguard</i>	Education Savings Plans 529 College Savings Plan	Spouse			
5.1	Moderate Growth Aged Based 19 and Older Money Market	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
5.2	Conservative Income Portfolio	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
6	New York Life Insurance <i>Provider: New York Life Insurance</i>	Life Insurance Whole	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
7	New York Life Insurance <i>Provider: New York Life Insurance</i>	Life Insurance Whole	Self	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
8	AuguStar Financial	Life Insurance	Self	\$15,001	Dividends,	\$201 -

	<i>Provider: AuguStar Financial Filer comment: Asset Formerly named Ohio National Life Insurance.</i>	Whole Asset Type	Owner	- Value \$50,000	Income Type	\$1,000 Income
9	AuguStar Financial <i>Provider: AuguStar Financial Filer comment: Formerly named Ohio National Life Insurance.</i>	Life Insurance Whole	Self	\$1,001 - \$15,000	Dividends,	\$201 - \$1,000
10	Metlife Insurance Company <i>Provider: Metlife Insurance Company</i>	Annuity Fixed	Spouse	\$1,001 - \$15,000	Interest,	None (or less than \$201)
11	Community Bank & Trust (formerly Communiy National Bank) (Waterloo, IA) <i>Type: Checking, Filer comment: Barbara's personal account. Farm checking account closed July 2024.</i>	Bank Deposit	Joint	\$15,001 - \$50,000	Interest,	None (or less than \$201)
12	Community Bank & Trust (formerly Communiy National Bank) (Waterloo, Iowa) <i>Type: Checking, Filer comment: Checking account for Grassley Family Farms, L.L.C.</i>	Bank Deposit	Self	\$100,001 - \$250,000	Interest,	None (or less than \$201)
13	BARBARA IRA RJ	Brokerage/Managed Account	Spouse			
13.1	RAYMOND JAMES BANK DEPOSIT PROGRAM (ST PETERSBURG, FL) <i>Type: Brokerage Sweep Account,</i>	Bank Deposit	Spouse	\$15,001 - \$50,000	Interest,	None (or less than \$201)
13.2	GSFTX - Columbia Dividend Income Fund Institutional Class	Mutual Funds Mutual Fund	Spouse	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
13.3	IGFFX - American Funds International Growth and Income Fun	Mutual Funds Mutual Fund	Spouse	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
13.4	PMDIX - Principal Small-MidCap Dividend Income Fund Instit	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
13.5	SOPYX - ClearBridge Dividend Strategy Fund Class I	Mutual Funds Mutual Fund	Spouse	\$250,001 - \$500,000	Excepted Investment Fund,	None (or less than \$201)
13.6	HHDFX - Hamlin High Dividend Equity Fd Inst CI	Mutual Funds Mutual Fund	Spouse	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
14	GRASSLEY FREEDOM	Brokerage/Managed Account	Joint			

14.1	ALTVX-AllianceBern Muni Income Natl Adv <small>Asset</small> (NASDAQ)	Mutual Funds Mutual Fund	Joint Owner	\$100,001 Value - \$250,000	Excepted Income Type Investment Fund,	\$2,501 - Income \$5,000
14.2	MQGIX - MFS International Growth I (NASDAQ)	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$1,001 - \$2,500
14.3	MRFIX - MFS Research Fund Class I	Mutual Funds Mutual Fund	Joint	\$250,001 - \$500,000	Excepted Investment Fund,	\$5,001 - \$15,000
14.4	PRINX - T. Rowe Price Summit Municipal Inc (NASDAQ)	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Excepted Investment Fund,	\$5,001 - \$15,000
14.5	RAYMOND JAMES BANK DEPOSIT PROGRAM (ST PETERSBURG, FL) <i>Type: Brokerage Sweep Account,</i>	Bank Deposit	Joint	\$15,001 - \$50,000	Interest,	None (or less than \$201)
14.6	ARSIX - ASTON/River Road Small Cap Value I (NASDAQ)	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$1,001 - \$2,500
14.7	CISMX-Clarkston Partners Institutional <i>Filer comment: Sold 8-8-24</i>	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Excepted Investment Fund,	None (or less than \$201)
14.8	MYSIX-Victory Trivalent International Sm- Cp Y	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Excepted Investment Fund,	\$1,001 - \$2,500
14.9	GSFTX - Columbia Dividend Income Fund Institutional Class <i>Filer comment: Sold 8-8-24</i>	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Excepted Investment Fund,	\$201 - \$1,000
14.10	PRCOX - T. Rowe Price U.S. Equity Research Fund	Mutual Funds Mutual Fund	Joint	\$250,001 - \$500,000	Excepted Investment Fund,	\$1,001 - \$2,500
14.11	WIAEX - Wasatch Small Cap Growth Fund Institutional Class	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
14.12	BAFGX - Brown Advisory Growth Equity Fund Institutional Sh <i>Filer comment: Sold 2-15-24</i>	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Excepted Investment Fund,	None (or less than \$201)
14.13	TROX - T. Rowe Price Overseas Stock Fund	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$1,001 - \$2,500
14.14	MADVX - Blackrock Eq Dividend I	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Excepted Investment Fund,	\$5,001 - \$15,000

Asset	Asset Type	Owner	\$250,000 Value	Fund, Income Type	Income
14.15 DFMLX - Df Dent Midcap Growth Fund - Institutional Plus <i>Filer comment: sold 8-8-24</i>	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Excepted Investment Fund,	None (or less than \$201)
14.16 JMIEX - Jpmorgan Emerging Markets Equity Fund Class L	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$201 - \$1,000
14.17 WFMIX - Allspring Special Mid Cap Value Fund Insti Class	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$2,501 - \$5,000
14.18 JMGRX - Janus Henderson Enterprise Fund - I Shares <i>Filer comment: Purchase 8-8-24</i>	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Excepted Investment Fund,	\$1,001 - \$2,500
14.19 PBCKX - Principal Funds Inc. Blue Chip Fd Inst Cl <i>Filer comment: Purchased 2-15-24</i>	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Excepted Investment Fund,	\$1,001 - \$2,500
15 CHUCK SEP IRA	Brokerage/Managed Account	Self			
15.1 ARIDX-ASTON/River Road Dividend All Cap Val I (NASDAQ) <i>Filer comment: Sold 2-13-24</i>	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	Excepted Investment Fund,	None (or less than \$201)
15.2 CAIFX-American Funds Capital Inc Bldr F2 (NASDAQ)	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
15.3 SVAIX-Federated Strategic Value Dividend Instl (NASDAQ)	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
15.4 EPSYX - Mainstay Epoch Global Equity Yield Fund Class I	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
15.5 PPSIX - Principal Preferred Securities Inst	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
15.6 RAYMOND JAMES BANK DEPOSIT PROGRAM (ST PETERSBURG, FL) <i>Type: Brokerage Sweep Account,</i>	Bank Deposit	Self	\$1,001 - \$15,000	Interest,	None (or less than \$201)
15.7 IGFFX-American Funds Intl Gr and Inc F2	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
15.8 GSFTX-Columbia Dividend Income Z	Mutual Funds Mutual Fund	Self	\$50,001 -	Excepted Investment	None (or less than

	Asset	Asset Type	Owner	\$100,000 Value	Fund Income Type	\$201 Income
15.9	HHDFX-Hamlin High Dividend Equity Instl	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
15.10	BIICX-BlackRock Multi-Asset Income Instl	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
15.11	VYM - Vanguard High Dividend Yield ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
15.12	GLIFX - Lazard Global Listed Infrastructure Portfolio Inst	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
15.13	VDIGX - Vanguard Dividend Growth Fund Investor Shares	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
15.14	VIG - Vanguard Div Appreciation ETF <i>Filer comment: Purchased 2-12-24 & 4-4-24</i>	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
16	GRASSLEY CAPITAL ACCESS JOINT	Brokerage/Managed Account	Joint			
16.1	NEA-Nuveen AMT-Free Quality Municipal Income Fund	Mutual Funds Exchange Traded Fund/Note	Joint	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
16.2	RAYMOND JAMES BANK DEPOSIT PROGRAM (ST PETERSBURG, FL) <i>Type: Brokerage Sweep Account,</i>	Bank Deposit	Joint	\$50,001 - \$100,000	Interest,	None (or less than \$201)
17	AXA EQUITABLE LIFE INS ACCUMULATOR <i>Provider: AXA</i>	Annuity Variable Annuity	Self			
17.1	AXA INTL VALUE VOLATILITY	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
17.2	EQ/CORE BOND INDEX	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
17.3	AXA MID CAP VALUE VOLAT	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
17.4	EQ/EQUITY 500 INDEX	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)

	Asset	Asset Type	Owner	\$250,000 Value	Fund, Income Type	\$201) Income
18	Barbara Grassley RJ Account	Brokerage/Managed Account	Spouse			
18.1	AMRMX - American Funds American Mutual A	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	\$1,001 - \$2,500

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	Spouse	AMRMX	American Mutual Fund Class A Shares	Purchase	12/18/2024	\$1,001 - \$15,000	n/a
2	Spouse	SOPYX	Clearbridge Dividend Strategy Fund Class I	Sale (Partial)	01/11/2024	\$1,001 - \$15,000	n/a
3	Spouse	GSFTX	Columbia Dividend Income Fund Class I	Sale (Partial)	01/11/2024	\$1,001 - \$15,000	n/a
4	Spouse	HHDFX	Hamlin High Dividend Equity Fd Inst Cl	Sale (Partial)	01/11/2024	\$1,001 - \$15,000	n/a
5	Spouse	PMDIX	Principal Funds Inc. Small-Midcap Dividend Inco	Sale (Partial)	01/11/2024	\$1,001 - \$15,000	n/a
6	Spouse	PMDIX	Principal Funds Inc. Small-Midcap Dividend	Sale (Partial)	03/04/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Inco Asset Name	Transaction Type	Transaction Date	Amount	Comments
7	Spouse	SOPYX	Clearbridge Dividend Strategy Fund Class I	Sale (Partial)	03/04/2024	\$1,001 - \$15,000	n/a
8	Spouse	GSFTX	Columbia Dividend Income Fund Class I	Sale (Partial)	03/04/2024	\$1,001 - \$15,000	n/a
9	Spouse	HHDFX	Hamlin High Dividend Equity Fd Inst CI	Sale (Partial)	03/04/2024	\$1,001 - \$15,000	n/a
10	Spouse	IGFFX	International Growth and Income Fd CI F-2 Shs	Sale (Partial)	03/25/2024	\$1,001 - \$15,000	n/a
11	Spouse	GSFTX	Columbia Dividend Income Fund Class I	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
12	Spouse	IGFFX	International Growth and Income Fd CI F-2 Shs	Purchase	03/25/2024	\$1,001 - \$15,000	n/a
13	Spouse	SOPYX	Clearbridge Dividend Strategy Fund Class I	Purchase	04/01/2024	\$1,001 - \$15,000	n/a
14	Spouse	PMDIX	Principal Funds Inc. Small- Midcap Dividend Inco	Sale (Partial)	05/14/2024	\$1,001 - \$15,000	n/a
15	Spouse	SOPYX	Clearbridge Dividend Strategy Fund Class I	Sale (Partial)	05/14/2024	\$1,001 - \$15,000	n/a
16	Spouse	GSFTX	Columbia Dividend Income Fund Class I	Sale (Partial)	05/14/2024	\$1,001 - \$15,000	n/a
17	Spouse	HHDFX	Hamlin High Dividend	Sale (Partial)	05/14/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Equity Fd Inst Cl Asset Name	Transaction Type	Transaction Date	Amount	Comments
18	Spouse	IGFFX	International Growth and Income Fd Cl F-2 Shs	Sale (Partial)	05/15/2024	\$1,001 - \$15,000	n/a
19	Spouse	PMDIX	Principal Funds Inc. Small- Midcap Dividend Inco	Purchase	06/21/2024	\$1,001 - \$15,000	n/a
20	Spouse	GSFTX	Columbia Dividend Income Fund Class I	Purchase	06/24/2024	\$1,001 - \$15,000	n/a
21	Spouse	IGFFX	International Growth and Income Fd Cl F-2 Shs	Purchase	06/24/2024	\$1,001 - \$15,000	n/a
22	Spouse	HHDFX	Hamlin High Dividend Equity Fd Inst Cl	Purchase	07/01/2024	\$1,001 - \$15,000	n/a
23	Spouse	SOPYX	Clearbridge Dividend Strategy Fund Class I	Purchase	07/01/2024	\$1,001 - \$15,000	n/a
24	Spouse	GSFTX	Columbia Dividend Income Fund Class I	Sale (Partial)	07/15/2024	\$1,001 - \$15,000	n/a
25	Spouse	HHDFX	Hamlin High Dividend Equity Fd Inst Cl	Sale (Partial)	07/15/2024	\$1,001 - \$15,000	n/a
26	Spouse	IGFFX	International Growth and Income Fd Cl F-2 Shs	Sale (Partial)	07/15/2024	\$1,001 - \$15,000	n/a
27	Spouse	SOPYX	Clearbridge Dividend Strategy Fund Class I	Sale (Partial)	07/15/2024	\$1,001 - \$15,000	n/a
28	Spouse	GSFTX	Columbia	Sale	09/04/2024	\$1,001 -	n/a

#	Owner	Ticker	Dividend Income Fund Asset Class Name	(Partial) Transaction Type	Transaction Date	\$15,000 Amount	Comments
29	Spouse	HHDFX	Hamlin High Dividend Equity Fd Inst Cl	Sale (Partial)	09/04/2024	\$1,001 - \$15,000	n/a
30	Spouse	IGFFX	International Growth and Income Fd Cl F-2 Shs	Purchase	09/04/2024	\$1,001 - \$15,000	n/a
31	Spouse	PMDIX	Principal Funds Inc. Small-Midcap Dividend Inco	Sale (Partial)	09/04/2024	\$1,001 - \$15,000	n/a
32	Spouse	SOPYX	Clearbridge Dividend Strategy Fund Class I	Sale (Partial)	09/04/2024	\$1,001 - \$15,000	n/a
33	Spouse	GSFTX	Columbia Dividend Income Fund Class I	Purchase	09/23/2024	\$1,001 - \$15,000	n/a
34	Spouse	IGFFX	International Growth and Income Fd Cl F-2 Shs	Purchase	09/24/2024	\$1,001 - \$15,000	n/a
35	Spouse	PMDIX	Principal Funds Inc. Small-Midcap Dividend Inco	Sale (Partial)	11/04/2024	\$1,001 - \$15,000	n/a
36	Spouse	GSFTX	Columbia Dividend Income Fund Class I	Sale (Partial)	11/04/2024	\$1,001 - \$15,000	n/a
37	Spouse	HHDFX	Hamlin High Dividend Equity Fd Inst Cl	Sale (Partial)	11/04/2024	\$1,001 - \$15,000	n/a
38	Spouse	IGFFX	International Growth and Income Fd Cl F-2 Shs	Purchase	11/04/2024	\$1,001 - \$15,000	n/a

#	Spouse	SOPYX	Clearbridge Dividend Strategy Fund Class I	Transaction Sale (Partial)	Transaction Date 04/2024	\$1,001 - \$15,000	Comments
40	Spouse	GSFTX	Columbia Dividend Income Fund Class I	Purchase	12/13/2024	\$1,001 - \$15,000	n/a
41	Spouse	PMDIX	Principal Funds Inc. Small-Midcap Dividend Inco	Purchase	12/13/2024	\$1,001 - \$15,000	n/a
42	Spouse	HHDFX	Hamlin High Dividend Equity Fd Inst Cl	Purchase	12/19/2024	\$1,001 - \$15,000	n/a
43	Spouse	IGFFX	International Growth and Income Fd Cl F-2 Shs	Purchase	12/23/2024	\$1,001 - \$15,000	n/a
44	Spouse	SOPYX	Clearbridge Dividend Strategy Fund Class I	Purchase	12/23/2024	\$15,001 - \$50,000	n/a
45	Spouse	HHDFX	Hamlin High Dividend Equity Fd Inst Cl	Purchase	12/30/2024	\$1,001 - \$15,000	n/a
46	Self	ARIDX	Amg River Road Dividend All Cap Value Fund - Cla	Sale (Full)	02/13/2024	\$15,001 - \$50,000	n/a
47	Self	BICX	Blackrock Funds II Blackrock Multi-Asset Income	Sale (Partial)	02/13/2024	\$15,001 - \$50,000	n/a
48	Self	VIG	Vanguard Div Appreciation ETF	Purchase	02/14/2024	\$15,001 - \$50,000	n/a
49	Self	PPSIX	Principal	Purchase	04/05/2024	\$1,001 -	n/a

#	Owner	Ticker	Funds Inc. - Spectrum Asset Name Preferred and C	Transaction Type	Transaction Date	\$15,000 Amount	Comments
50	Self	VDIGX	Vanguard Specialized Portfolios Vanguard Divide	Purchase	04/05/2024	\$1,001 - \$15,000	n/a
51	Self	BIICX	Blackrock Funds II Blackrock Multi-Asset Income	Purchase	04/05/2024	\$1,001 - \$15,000	n/a
52	Self	EPSYX	Nyli Epoch Global Equity Yield Fund Class I	Purchase	04/05/2024	\$1,001 - \$15,000	n/a
53	Self	GLIFX	Lazard Global Listed Infrastructure Ptf Insti Sh	Purchase	04/05/2024	\$1,001 - \$15,000	n/a
54	Self	GSFTX	Columbia Dividend Income Fund Class I	Purchase	04/05/2024	\$1,001 - \$15,000	n/a
55	Self	HHDFX	Hamlin High Dividend Equity Fd Inst Cl	Purchase	04/05/2024	\$1,001 - \$15,000	n/a
56	Self	VYM	High Dividend Yield Vanguard ETF	Purchase	04/05/2024	\$1,001 - \$15,000	n/a
57	Self	VIG	Vanguard Div Appreciation ETF	Purchase	04/05/2024	\$1,001 - \$15,000	n/a
58	Self	SVAIX	Federated Strategic Value Dividend Fund Class Is	Purchase	04/05/2024	\$1,001 - \$15,000	n/a
59	Self	CAIFX	Capital	Purchase	04/05/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Income Builder CI F-2 Shs Asset Name	Transaction Type	Transaction Date	\$15,000 Amount	Comments
60	Self	IGFFX	International Growth and Income Fd CI F-2 Shs	Purchase	04/05/2024	\$1,001 - \$15,000	n/a
61	Self	PPSIX	Principal Funds Inc. - Spectrum Preferred and C	Sale (Partial)	11/25/2024	\$1,001 - \$15,000	n/a
62	Self	VIG	Vanguard Div Appreciation ETF	Sale (Partial)	11/25/2024	\$1,001 - \$15,000	n/a
63	Self	VYM	Vanguard High Dividend Yield ETF	Sale (Partial)	11/25/2024	\$1,001 - \$15,000	n/a
64	Self	BICX	Blackrock Funds II Blackrock Multi-Asset Income	Sale (Partial)	11/25/2024	\$1,001 - \$15,000	n/a
65	Self	CAIFX	Capital Income Builder CI F-2 Shs	Sale (Partial)	11/25/2024	\$1,001 - \$15,000	n/a
66	Self	EPSYX	Nyli Epoch Global Equity Yield Fund Class I	Sale (Partial)	11/25/2024	\$1,001 - \$15,000	n/a
67	Self	GLIFX	Lazard Global Listed Infrastructure Ptf Insti Sh	Sale (Partial)	11/25/2024	\$1,001 - \$15,000	n/a
68	Self	GSFTX	Columbia Dividend Income Fund Class I	Sale (Partial)	11/25/2024	\$1,001 - \$15,000	n/a
69	Self	HHDFX	Hamlin High Dividend Equity Fd Inst CI	Sale (Partial)	11/25/2024	\$1,001 - \$15,000	n/a
70	Self	SVAIX	Federated	Sale	11/25/2024	\$1,001 -	n/a

#	Owner	Ticker	Fund Name	Transaction Type	Transaction Date	Value	Comments
70	Self	VVAIX	Strategic Value	Sale (Partial)	11/25/2024	\$1,001 - \$15,000	n/a
			Dividend Fund Class Is				
71	Self	VDIGX	Vanguard Specialized Portfolios Vanguard Divide	Sale (Partial)	11/25/2024	\$1,001 - \$15,000	n/a
72	Self	EPSYX	Nyli Epoch Global Equity Yield Fund Class I	Purchase	12/06/2024	\$1,001 - \$15,000	n/a
73	Self	GSFTX	Columbia Dividend Income Fund Class I	Purchase	12/13/2024	\$1,001 - \$15,000	n/a
74	Self	HHDFX	Hamlin High Dividend Equity Fd Inst Cl	Purchase	11/19/2024	\$1,001 - \$15,000	n/a
75	Self	CAIFX	Capital Income Builder Cl F-2 Shs	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
76	Self	VDIGX	Vanguard Specialized Portfolios Vanguard Divide	Purchase	12/31/2024	\$1,001 - \$15,000	n/a
77	Joint	BAFGX	Brown Advisory Growth Equity Fd - Institutional	Sale (Full)	02/15/2024	\$100,001 - \$250,000	n/a
78	Joint	PBCKX	Principal Funds Inc. Blue Chip Fd Inst Cl	Purchase	02/15/2024	\$100,001 - \$250,000	n/a
79	Joint	ARSIX	Amg River Road Small Cap Value Fund - Class I	Purchase	03/13/2024	\$1,001 - \$15,000	n/a
80	Joint	DFMLX	Df Dent	Sale	03/13/2024	\$1,001 -	n/a

#	Owner	Ticker	Midcap Growth Fund Asset Name - Institutional Plus	(Partial) Transaction Type	Transaction Date	\$15,000 Amount	Comments
81	Joint	JMIEX	Jpmorgan Emerging Markets Equity Fund Class L	Purchase	03/13/2024	\$1,001 - \$15,000	n/a
82	Joint	MADVX	Blackrock Eq Dividend I	Sale (Partial)	03/13/2024	\$1,001 - \$15,000	n/a
83	Joint	PBCKX	Principal Funds Inc. Blue Chip Fd Inst Cl	Purchase	03/13/2024	\$1,001 - \$15,000	n/a
84	Joint	PRCOX	T. Rowe Price U.S. Equity Research Fund	Sale (Partial)	03/13/2024	\$1,001 - \$15,000	n/a
85	Joint	PRINX	T. Rowe Price Summit Municipal Income Fund	Purchase	03/13/2024	\$1,001 - \$15,000	n/a
86	Joint	TROSX	T. Rowe Price Overseas Stock Fund	Purchase	03/13/2024	\$1,001 - \$15,000	n/a
87	Joint	ALTVX	Ab Municipal Income Fund Inc. - National Portfo	Purchase	03/14/2024	\$1,001 - \$15,000	n/a
88	Joint	MQGIX	MFS International Growth Fund - Class I	Purchase	03/14/2024	\$1,001 - \$15,000	n/a
89	Joint	ARSIX	Amg River Road Small Cap Value Fund - Class I	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
90	Joint	CISMX	Clarkston Partners Fund.	Purchase	03/21/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	institutional Class Asset Name	Transaction Type	Transaction Date	Amount	Comments
91	Joint	DFMLX	Df Dent Midcap Growth Fund - Institutional Plus	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
92	Joint	GSFTX	Columbia Dividend Income Fund Class I	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
93	Joint	JMIEX	Jpmorgan Emerging Markets Equity Fund Class L	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
94	Joint	MADVX	Blackrock Eq Dividend I	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
95	Joint	MYSIX	Victory Trivalent International Small-Cap Cl Y	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
96	Joint	PBCKX	Principal Funds Inc. Blue Chip Fd Inst Cl	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
97	Joint	PRCOX	T. Rowe Price U.S. Equity Research Fund	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
98	Joint	PRINX	T. Rowe Price Summit Municipal Income Fund	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
99	Joint	TROSX	T. Rowe Price Overseas Stock Fund	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
100	Joint	WIAEX	Wasatch Small Cap Growth Fund Instl Cl	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
101	Joint	WFMIX	Allspring	Purchase	03/22/2024	\$1,001 -	n/a

#	Owner	Ticker	Fund Name	Transaction Type	Transaction Date	Amount	Comments
102	Joint	ALTVX	Ab Municipal Income Fund Inc. - National Portfo	Purchase	03/22/2024	\$1,001 - \$15,000	n/a
103	Joint	MQGIX	MFS International Growth Fund - Class I	Purchase	03/22/2024	\$1,001 - \$15,000	n/a
104	Joint	MRFIX	MFS Series Trust V - MFS Research Fund Class I	Purchase	03/22/2024	\$1,001 - \$15,000	n/a
105	Joint	PRINX	T. Rowe Price Summit Municipal Income Fund	Purchase	07/16/2024	\$1,001 - \$15,000	n/a
106	Joint	WFMIX	Allspring Special Mid Cap Value Fund Insti Class	Purchase	07/16/2024	\$1,001 - \$15,000	n/a
107	Joint	ALTVX	Ab Municipal Income Fund Inc. - National Portfo	Purchase	07/16/2024	\$1,001 - \$15,000	n/a
108	Joint	ARSIX	Amg River Road Small Cap Value Fund - Class I	Purchase	07/16/2024	\$1,001 - \$15,000	n/a
109	Joint	CISMX	Clarkston Partners Fund. Institutional Class	Purchase	07/16/2024	\$1,001 - \$15,000	n/a
110	Joint	DFMLX	Df Dent Midcap Growth Fund - Institutional	Purchase	07/16/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
111	Joint	GSFTX	Plus Columbia Dividend Income Fund Class I	Purchase	07/16/2024	\$1,001 - \$15,000	n/a
112	Joint	JMIEX	Jpmorgan Emerging Markets Equity Fund Class L	Sale (Partial)	07/16/2024	\$1,001 - \$15,000	n/a
113	Joint	MADVX	Blackrock Eq Dividend I	Purchase	07/16/2024	\$1,001 - \$15,000	n/a
114	Joint	PRCOX	T. Rowe Price U.S. Equity Research Fund	Sale (Partial)	07/16/2024	\$1,001 - \$15,000	n/a
115	Joint	WIAEX	Wasatch Small Cap Growth Fund Instl Cl	Purchase	07/16/2024	\$1,001 - \$15,000	n/a
116	Joint	MADVX	Blackrock Eq Dividend I	Purchase	07/19/2024	\$1,001 - \$15,000	n/a
117	Joint	MRFIX	MFS Series Trust V - MFS Research Fund Class I	Purchase	08/08/2024	\$15,001 - \$50,000	n/a
118	Joint	CISMXX	Clarkston Partners Fund. Institutional Class	Sale (Full)	08/08/2024	\$15,001 - \$50,000	n/a
119	Joint	DFMLX	Df Dent Midcap Growth Fund - Institutional Plus	Sale (Full)	08/08/2024	\$50,001 - \$100,000	n/a
120	Joint	GSFTX	Columbia Dividend Income Fund Class I	Sale (Full)	08/08/2024	\$50,001 - \$100,000	n/a
121	Joint	JMGRX	Janus Henderson Enterprise Fund I	Purchase	08/08/2024	\$50,001 - \$100,000	n/a

#	Owner	Ticker	Fund - Shares Asset Name	Transaction Type	Transaction Date	Amount	Comments
122	Joint	PRCOX	T. Rowe Price U.S. Equity Research Fund	Purchase	08/08/2024	\$15,001 - \$50,000	n/a
123	Joint	ALTVX	Ab Municipal Income Fund Inc. - National Portfo	Purchase	11/20/2024	\$1,001 - \$15,000	n/a
124	Joint	ARSIX	Amg River Road Small Cap Value Fund - Class I	Sale (Partial)	11/20/2024	\$1,001 - \$15,000	n/a
125	Joint	JMIEX	Jpmorgan Emerging Markets Equity Fund Class L	Purchase	11/20/2024	\$1,001 - \$15,000	n/a
126	Joint	MADVX	Blackrock Eq Dividend I	Purchase	11/20/2024	\$1,001 - \$15,000	n/a
127	Joint	MQGIX	MFS International Growth Fund - Class I	Purchase	11/20/2024	\$1,001 - \$15,000	n/a
128	Joint	MRFIX	MFS Series Trust V - MFS Research Fund Class I	Sale (Partial)	11/20/2024	\$1,001 - \$15,000	n/a
129	Joint	MYSIX	Victory Trivalent International Small-Cap CI Y	Purchase	11/20/2024	\$1,001 - \$15,000	n/a
130	Joint	PRCOX	T. Rowe Price U.S. Equity Research Fund	Purchase	11/20/2024	\$1,001 - \$15,000	n/a
131	Joint	PRINX	T. Rowe Price Summit Municipal	Purchase	11/20/2024	\$1,001 - \$15,000	n/a

			Income Fund	Transaction	Transaction		
#	Owner	Ticker	Asset Name	Type	Date	Amount	Comments
132	Joint	TROXX	T. Rowe Price Overseas Stock Fund	Purchase	11/20/2024	\$1,001 - \$15,000	n/a
133	Joint	WIAEX	Wasatch Small Cap Growth Fund Instl Cl	Sale (Partial)	11/20/2024	\$1,001 - \$15,000	n/a
134	Joint	ALTVX	Ab Municipal Income Fund Inc. - National Portfo	Purchase	11/27/2024	\$1,001 - \$15,000	n/a
135	Joint	JMGRX	Janus Henderson Enterprise Fund - I Shares	Sale (Partial)	11/27/2024	\$1,001 - \$15,000	n/a
136	Joint	JMIEX	Jpmorgan Emerging Markets Equity Fund Class L	Purchase	11/27/2024	\$1,001 - \$15,000	n/a
137	Joint	MADVX	Blackrock Eq Dividend I	Purchase	11/27/2024	\$1,001 - \$15,000	n/a
138	Joint	MQGIX	MFS International Growth Fund - Class I	Purchase	11/27/2024	\$1,001 - \$15,000	n/a
139	Joint	MRFIX	MFS Series Trust V - MFS Research Fund Class I	Purchase	11/27/2024	\$1,001 - \$15,000	n/a
140	Joint	PBCKX	Principal Funds Inc. Blue Chip Fd Inst Cl	Purchase	11/27/2024	\$1,001 - \$15,000	n/a
141	Joint	PRCOX	T. Rowe Price U.S. Equity Research Fund	Purchase	11/27/2024	\$1,001 - \$15,000	n/a
142	Joint	PRINX	T. Rowe	Purchase	11/27/2024	\$1,001 -	n/a

#	Owner	Ticker	Price Summit Asset Name Municipal	Transaction Type	Transaction Date	\$15,000 Amount	Comments
Income Fund							
143	Joint	TROSX	T. Rowe Price Overseas Stock Fund	Purchase	11/27/2024	\$1,001 - \$15,000	n/a
144	Joint	WIAEX	Wasatch Small Cap Growth Fund Instl Cl	Sale (Partial)	11/27/2024	\$1,001 - \$15,000	n/a
145	Joint	JMGRX	Janus Henderson Enterprise Fund - I Shares	Purchase	12/09/2024	\$1,001 - \$15,000	n/a
146	Joint	MADVX	Blackrock Eq Dividend I	Purchase	12/11/2024	\$1,001 - \$15,000	n/a
147	Joint	MADVX	Blackrock Eq Dividend I	Purchase	12/11/2024	\$1,001 - \$15,000	n/a
148	Joint	MRFIX	MFS Series Trust V - MFS Research Fund Class I	Purchase	12/11/2024	\$15,001 - \$50,000	n/a
149	Joint	PBCKX	Principal Funds Inc. Blue Chip Fd Inst Cl	Purchase	12/13/2024	\$1,001 - \$15,000	n/a
150	Joint	WFMIX	Allspring Special Mid Cap Value Fund Insti Class	Purchase	12/13/2024	\$1,001 - \$15,000	n/a
151	Joint	PRCOX	T. Rowe Price U.S. Equity Research Fund	Purchase	12/13/2024	\$1,001 - \$15,000	n/a
152	Joint	TROSX	T. Rowe Price Overseas Stock Fund	Purchase	12/16/2024	\$1,001 - \$15,000	n/a
153	Joint	ARSIX	Amg River Bond Growth	Purchase	12/17/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Asset Class	Transaction Type	Transaction Date	Amount	Comments
			Small Cap Value Fund - Class I			\$15,000	
154	Joint	MQGIX	MFS International Growth Fund - Class I	Purchase	12/18/2024	\$1,001 - \$15,000	n/a
155	Joint	JMIEX	Jpmorgan Emerging Markets Equity Fund Class L	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
156	Joint	WFMIX	Allspring Special Mid Cap Value Fund Insti Class	Purchase	12/23/2024	\$1,001 - \$15,000	n/a
157	Self	--	Property Sale - Pat Grassley	Sale (Partial)	03/01/2024	\$1,001 - \$15,000	This property, listed in Assets 3.3, 3.4 and 3.6, is being sold under a long-term contract.
158	Self	--	Property Sale - Robin Grassley	Sale (Partial)	03/01/2024	\$15,001 - \$50,000	This property, listed in Assets 3.3, 3.4 and 3.6, is being sold under a long-term contract.
159	Self	--	Property Sale - Pat Grassley	Sale (Partial)	11/01/2024	\$1,001 - \$15,000	This property, listed in Assets 3.3, 3.4 and 3.6, is being sold under a long-term contract.
160	Self	--	Property Sale - Robin Grassley	Sale (Partial)	11/01/2024	\$15,001 - \$50,000	This property, listed in Assets 3.3, 3.4 and 3.6, is being sold under a long-term contract.

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? **No**

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 2022 to present	Officer	Grassley Family Farms, L.L.C. Cedar Falls, IA	Other (L.L.C.)	n/a

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? **This is not my first report.**

Attachments & Comments

No attachments added.

No comments added.