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Annual Report for Calendar 2024

The Honorable Daniel S Sullivan (Sullivan, Dan)

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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? **No**

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	MALOX - BlackRock Global Allocation Instl (NASDAQ)	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends, Capital Gains, Excepted Investment Fund,	\$2,501 - \$5,000
2	NARAX - Virtus Multi-Sector S/T Bd A (NASDAQ)	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends, Capital Gains, Excepted Investment Fund,	\$5,001 - \$15,000

3	RPM - RPM International Inc. (NYSE) Asset	Corporate Securities Stock	Joint Owner	\$1,000,001 Value \$5,000,000	Dividends, Capital Gains, Income Type	\$15,001 - \$50,000
4	MANLX - BlackRock National Municipal Instl (NASDAQ)	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Dividends, Capital Gains, Excepted Investment Fund,	\$5,001 - \$15,000
5	AFTFX - American Funds TaxExempt Bond F1 (NASDAQ)	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends, Capital Gains, Excepted Investment Fund,	\$5,001 - \$15,000
6	State of Alaska Permanent Fund <i>Description: State Fund Managed by Alaska Permanent Fund Corp. (Juneau, AK)</i>	Other Securities	Self	None (or less than \$1,001)	Excepted Investment Fund,	\$1,001 - \$2,500
7	State of Alaska Permanent Fund <i>Description: State Fund Managed by Alaska Permanent Fund Corp. (Juneau, AK)</i>	Other Securities	Spouse	None (or less than \$1,001)	Excepted Investment Fund,	\$1,001 - \$2,500
8	Rental Property <i>Description: 301 Crystal Mtn. Rd (Girdwood, AK)</i>	Real Estate Residential	Joint	\$250,001 - \$500,000	Rent/Royalties,	\$5,001 - \$15,000
9	IRA	Retirement Plans IRA	Self			
9.1	FGTX Goldman Sachs FS Government Fund	Mutual Funds Mutual Fund	Self	None (or less than \$1,001)	Excepted Investment Fund,	None (or less than \$201)
9.2	FXAIX - Fidelity 500 Index Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
9.3	MASKX - Ishares Russell 2000 Small- Cap Index Fund - Inst	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
9.4	FSGGX - Fidelity Global Ex U.S. Index Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
9.5	VBTLX - Vanguard Total Bond Market Index Fund Admiral Sh	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
10	IRA	Retirement Plans IRA	Spouse			
10.1	FGTX GS FS Government Fund	Mutual Funds Mutual Fund	Spouse	None (or less than \$1,001)	Excepted Investment Fund,	None (or less than \$201)

10.2	FXAIX - Fidelity 500 Index Fund <small>Asset</small>	Mutual Funds Mutual Fund	Spouse Owner	\$1,001 - \$15,000	Value Income Type	Excepted Investment Fund,	None (or less than \$201)
10.3	MASKX - Ishares Russell 2000 Small-Cap Index Fund - Inst	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000		Excepted Investment Fund,	None (or less than \$201)
10.4	FSGGX - Fidelity Global Ex U.S. Index Fund	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000		Excepted Investment Fund,	None (or less than \$201)
10.5	VBTLX - Vanguard Total Bond Market Index Fund Admiral Sh	Mutual Funds Mutual Fund	Spouse	None (or less than \$1,001)		Excepted Investment Fund,	None (or less than \$201)
11	Uniform Transfer to Minors Act College Fund	UGMA/UTMA	Child				
11.1	HNACX - Harbor Capital Appreciation Fund Retirement Class	Mutual Funds Mutual Fund	Child	\$15,001 - \$50,000		Capital Gains, Excepted Investment Fund,	\$2,501 - \$5,000
11.2	HNVRX - Harbor Small Cap Value Fund Retirement Class	Mutual Funds Mutual Fund	Child	\$1,001 - \$15,000		Excepted Investment Fund,	None (or less than \$201)
11.3	VPMAX - Vanguard PRIMECAP Adm (NASDAQ)	Mutual Funds Mutual Fund	Child	\$15,001 - \$50,000		Dividends, Capital Gains, Excepted Investment Fund,	\$1,001 - \$2,500
11.4	WCMIX - WCM Focused International Growth Fund Institutional	Mutual Funds Mutual Fund	Child	\$1,001 - \$15,000		Dividends, Capital Gains, Excepted Investment Fund,	\$201 - \$1,000
11.5	FTXXX - GS Investor Tax-Exempt Money Market Fund	Mutual Funds Stable Value Fund	Child	\$1,001 - \$15,000		Interest, Excepted Investment Fund,	None (or less than \$201)
11.6	SIDRX - Hartford Schoders International Multi-Cap Value F	Mutual Funds Mutual Fund	Child	\$1,001 - \$15,000		Dividends, Excepted Investment Fund,	None (or less than \$201)
11.7	DODGX - Dodge & Cox Stock Fund	Mutual Funds Mutual Fund	Child	\$15,001 - \$50,000		Dividends, Capital Gains, Excepted Investment Fund,	\$1,001 - \$2,500
11.8	CCALX - Conestoga Small Cap Fund Institutional Class	Mutual Funds Mutual Fund	Child	\$1,001 - \$15,000		Excepted Investment Fund,	None (or less than \$201)
11.9	GQGIX - Gqg Partners Emerging Markets Equity Fund Instit	Mutual Funds Mutual Fund	Child	\$1,001 - \$15,000		Excepted Investment Fund,	None (or less than \$201)
11.10	VOO - Vanguard S&P 500 ETF	Mutual Funds	Child	\$1,001 -		Excepted Investment	None (or

11.10	VOOG - Vanguard S&P 500 ETF Asset	Mutual Funds Exchange Traded Fund/Note	Child Owner	\$1,001 - \$15,000	Excepted Investment Fund, Type	None (or less than \$201)
12	IWF - iShares Russell 1000 Growth (NYSEArca)	Mutual Funds Exchange Traded Fund/Note	Joint	\$250,001 - \$500,000	Dividends, Excepted Investment Fund,	\$1,001 - \$2,500
13	IWD - iShares Russell 1000 Value (NYSEArca)	Mutual Funds Exchange Traded Fund/Note	Joint	\$1,001 - \$15,000	Dividends, Excepted Investment Fund,	\$201 - \$1,000
14	EFA - iShares MSCI EAFE (NYSEArca)	Mutual Funds Exchange Traded Fund/Note	Joint	\$50,001 - \$100,000	Dividends, Excepted Investment Fund,	\$1,001 - \$2,500
15	GFAFX - American Funds Growth Fund of Amer F1 (NASDAQ)	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends, Capital Gains, Excepted Investment Fund,	\$1,001 - \$2,500
16	Birch Lake Townsite <i>Description:</i> Block 1, Lot 14 Birch Lake Townsite (Birch Lake, Alaska)	Real Estate Unimproved Land	Spouse	\$15,001 - \$50,000	None,	None (or less than \$201)
17	Birch Lake Townsite <i>Description:</i> Block 1, Lot 13 Birch lake Townsite (Birch Lake, Alaska)	Real Estate Unimproved Land	Spouse	\$100,001 - \$250,000	None,	None (or less than \$201)
18	FTXXX - GS Investor Tax-Exempt Money Market Fund	Mutual Funds Stable Value Fund	Joint	\$250,001 - \$500,000	Interest, Excepted Investment Fund,	\$15,001 - \$50,000
19	Wells Fargo (Anchorage, AK) <i>Type:</i> Checking, Savings,	Bank Deposit	Joint	\$1,001 - \$15,000	None,	None (or less than \$201)
20	Baan O Yeel Kon <i>Description:</i> Alaska Native Claims Settlement Act village corporation (Rampart, AK)	Other Securities	Spouse	None (or less than \$1,001)	None, Excepted Investment Fund,	None (or less than \$201)
21	Doyon Limited <i>Description:</i> Alaska Native Claims Settlement Act regional corporation (Fairbanks, AK)	Other Securities	Spouse	\$1,001 - \$15,000	None, Excepted Investment Fund,	None (or less than \$201)
22	529 Education Plan - Child 1 <i>Institution:</i> BlackRock 529 College Advantage	Education Savings Plans 529 College Savings Plan	Spouse			

22.1	BlackRock Moderate Portfolio Option - A Asset	Mutual Funds Mutual Fund	Spouse Owner	\$100,001 - \$250,000	Excepted Investment Fund,	None (or less than \$201)
22.2	BlackRock Growth Portfolio Option - A	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
22.3	BlackRock College Enrollment Option - A	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	Excepted Investment Fund,	None (or less than \$201)
23	529 Education Plan - Child 2 <i>Institution: BlackRock 529 College Advantage</i>	Education Savings Plans 529 College Savings Plan	Spouse			
23.1	BlackRock Moderate Portfolio Option - A	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
23.2	BlackRock Growth Portfolio Option - A	Mutual Funds Mutual Fund	Spouse	\$50,001 - \$100,000	Excepted Investment Fund,	None (or less than \$201)
23.3	BR College Enrollment Option - A	Mutual Funds Mutual Fund	Spouse	\$15,001 - \$50,000	Excepted Investment Fund,	None (or less than \$201)
24	WCMIX - WCM Focused International Growth Fund Institutional	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends, Excepted Investment Fund,	\$201 - \$1,000
25	ABCIX - American Beacon The London Company Income Equity	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Dividends, Excepted Investment Fund,	\$201 - \$1,000
26	VEA - Vanguard FTSE Developed Markets ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$15,001 - \$50,000	Dividends, Excepted Investment Fund,	\$1,001 - \$2,500
27	VOO - Vanguard S&P 500 ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$250,001 - \$500,000	Dividends, Excepted Investment Fund,	\$2,501 - \$5,000
28	CCALX - Conestoga Small Cap Fund Institutional Class	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Capital Gains, Excepted Investment Fund,	\$201 - \$1,000
29	DODGX - Dodge & Cox Stock Fund	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Dividends, Capital Gains, Excepted Investment Fund,	\$201 - \$1,000
30	GQEIX - Ggg Partners US Select Quality Equity Fund Insti	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Dividends, Excepted Investment Fund,	\$201 - \$1,000

31	Asset POLIX - Polen Growth Fund Institutional Class	Asset Type Mutual Funds Mutual Fund	Owner Joint	Value \$100,001 - \$250,000	Income Type Capital Gains, Excepted Investment Fund,	Income \$2,501 - \$5,000
32	GTCMX - Glenmede PtfIs Muni Intermediate Portfolio	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Dividends, Capital Gains, Excepted Investment Fund,	\$201 - \$1,000
33	Global Credit Union (Anchorage, AK) Type: Savings,	Bank Deposit	Spouse	\$50,001 - \$100,000	Interest,	\$2,501 - \$5,000
34	BMVP - Invesco Bloomberg Mvp Multi- Factor ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Dividends, Capital Gains, Excepted Investment Fund,	\$5,001 - \$15,000
35	GTCSX - Glenmede Small Capitalization Equity Portfolio A	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends, Excepted Investment Fund,	\$201 - \$1,000
36	DFAPX - Dfa Investment Grade Portfolio	Mutual Funds Mutual Fund	Joint	\$50,001 - \$100,000	Dividends, Excepted Investment Fund,	\$1,001 - \$2,500
37	VAIPX - Vanguard Inflation Protected Securities Fund Adm	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Dividends, Capital Gains, Excepted Investment Fund,	\$201 - \$1,000
38	EAGL - Eagle Capital Select Equity ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Dividends, Excepted Investment Fund,	\$201 - \$1,000
39	QQQ - Invesco QQQ Trust, Series 1	Mutual Funds Exchange Traded Fund/Note	Joint	\$50,001 - \$100,000	Dividends, Excepted Investment Fund,	\$1,001 - \$2,500
40	PVAL - Putnam Focused Large Cap Value ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Dividends, Excepted Investment Fund,	\$1,001 - \$2,500
41	IJR - iShares Core S&P Small-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$50,001 - \$100,000	Dividends, Excepted Investment Fund,	\$1,001 - \$2,500
42	Vanguard Index Funds Small Cap ETF- VB	Mutual Funds Exchange Traded Fund/Note	Joint	\$100,001 - \$250,000	Dividends, Excepted Investment Fund,	\$1,001 - \$2,500
43	DODFX - Dodge & Cox International Stock Fund	Mutual Funds Mutual Fund	Joint	\$15,001 - \$50,000	Dividends, Excepted Investment Fund,	\$201 - \$1,000

44	EMXC - Emrg Mkts Ex China Ishares Asset MSCI ETF	Mutual Funds Asset Type Exchange Traded Fund/Note	Joint Owner	\$50,001 - Value \$100,000	Dividends, Excepted Income Type Investment Fund,	\$1,001 - Income \$2,500
45	VWIUX - Vanguard Intermediate-Term Tax-Exempt Fd Admiral	Mutual Funds Mutual Fund	Joint	\$100,001 - \$250,000	Dividends, Excepted Investment Fund,	\$2,501 - \$5,000
46	VNQ - Vanguard Real Estate ETF	Mutual Funds Exchange Traded Fund/Note	Joint	\$15,001 - \$50,000	Dividends, Excepted Investment Fund,	\$1,001 - \$2,500
47	GQGIX	Mutual Funds Mutual Fund	Joint	None (or less than \$1,001)	Capital Gains, Excepted Investment Fund,	\$5,001 - \$15,000

Part 4a. Periodic Transaction Report Summary

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

Transaction #	Date	Owner	Ticker	Asset Name	Type	Amount	Comment
1	01/24/2024	Joint	RPM	RPM International Inc. Common Stock	Sale (Partial)	\$15,001 - \$50,000	Third Party investment professional manages portfolio and oversees long-term diversification strategy that regularly includes similar transactions.

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	DODFX	Dodge & Cox International Stock Fund	Purchase	01/08/2024	\$15,001 - \$50,000	n/a
2	Joint	EAGL	Eagle Capital Select Equity ETF	Purchase	11/04/2024	\$50,001 - \$100,000	n/a
3	Joint	EAGL	Eagle Capital Select Equity ETF	Purchase	10/15/2024	\$50,001 - \$100,000	n/a
4	Joint	GTCSX	Glenmede Small	Purchase	01/24/2024	\$1,001 - \$15,000	n/a

#	Owner	Ticker	Capitalization Equity Asset Name Portfolio A	Transaction Type	Transaction Date	Amount	Comments
5	Joint	GTCSX	Glenmede Small Capitalization Equity Portfolio A	Purchase	01/08/2024	\$15,001 - \$50,000	n/a
6	Joint	GQEIX	Gqg Partners US Select Quality Equity Fund Insti	Purchase	03/21/2024	\$15,001 - \$50,000	n/a
7	Joint	QQQ	Invesco QQQ Trust, Series 1	Purchase	11/05/2024	\$15,001 - \$50,000	n/a
8	Joint	EMXC	Emrg Mkts Ex China Ishares MSCI ETF	Purchase	01/23/2024	\$15,001 - \$50,000	n/a
9	Joint	IJR	iShares Core S&P Small- Cap	Purchase	01/29/2024	\$15,001 - \$50,000	n/a
10	Joint	IJR	iShares Core S&P Small- Cap	Purchase	01/08/2024	\$15,001 - \$50,000	n/a
11	Joint	PVAL	Putnam Focused Large Cap Value ETF	Purchase	01/29/2024	\$50,001 - \$100,000	n/a
12	Joint	PVAL	Putnam Focused Large Cap Value ETF	Purchase	01/23/2024	\$15,001 - \$50,000	n/a
13	Joint	VNQ	Vanguard Real Estate ETF	Purchase	10/14/2024	\$15,001 - \$50,000	n/a
14	Joint	VNQ	Vanguard Real Estate ETF	Purchase	03/21/2024	\$15,001 - \$50,000	n/a
15	Joint	VOO	Vanguard S&P 500 ETF	Purchase	06/20/2024	\$15,001 - \$50,000	n/a
16	Joint	VOO	Vanguard	Purchase	03/21/2024	\$15,001	n/a

#	Owner	Ticker	S&P 500 ETF Asset Name	Transaction Type	Transaction Date	- \$50,000 Amount	Comments
17	Joint	VOO	Vanguard S&P 500 ETF	Purchase	01/24/2024	\$15,001 - \$50,000	n/a
18	Joint	VOO	Vanguard S&P 500 ETF	Purchase	01/08/2024	\$100,001 - \$250,000	n/a
19	Joint	--	Vanguard Index Funds Small Cap ETF - VB	Purchase	10/14/2024	\$15,001 - \$50,000	n/a
20	Joint	--	Vanguard Index Funds Small Cap ETF -- VB	Purchase	07/31/2024	\$15,001 - \$50,000	n/a
21	Joint	--	Vanguard Index Funds Small Cap ETF -- VB	Purchase	03/21/2024	\$15,001 - \$50,000	n/a
22	Joint	VWIUX	Vanguard Intermediate- Term Tax- Exempt Fd Admiral	Purchase	10/14/2024	\$15,001 - \$50,000	n/a
23	Joint	VWIUX	Vanguard Intermediate- Term Tax- Exempt Fd Admiral	Purchase	06/28/2024	\$50,001 - \$100,000	n/a
24	Joint	VWIUX	Vanguard Intermediate- Term Tax- Exempt Fd Admiral	Purchase	06/20/2024	\$1,001 - \$15,000	n/a
25	Joint	VWIUX	Vanguard Intermediate- Term Tax- Exempt Fd Admiral	Purchase	03/21/2024	\$1,001 - \$15,000	n/a
26	Joint	VWIUX	Vanguard Intermediate- Term Tax- Exempt Fd Admiral	Purchase	01/24/2024	\$15,001 - \$50,000	n/a
27	Joint	GEAEX	The Growth	Sale	01/08/2024	\$1,001	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
27	Joint	GFAXX	The Growth Fund of America Class F-1 Shares	Sale (Partial)	01/08/2024	\$1,001 - \$15,000	n/a
28	Joint	AFTFX	American Fds The Tax-Exempt Bond Fund of Ameri	Sale (Partial)	03/21/2024	\$1,001 - \$15,000	n/a
29	Joint	AFTFX	American Fds The Tax-Exempt Bond Fund of Ameri	Sale (Partial)	01/08/2024	\$1,001 - \$15,000	n/a
30	Joint	MALOX	Blackrock Global Alloc I	Sale (Partial)	03/21/2024	\$15,001 - \$50,000	n/a
31	Joint	MALOX	Blackrock Global Alloc I	Sale (Partial)	01/29/2024	\$15,001 - \$50,000	n/a
32	Joint	MALOX	Blackrock Global Alloc I	Sale (Partial)	01/08/2024	\$1,001 - \$15,000	n/a
33	Joint	MANLX	Blackrock National Muni I	Sale (Partial)	03/21/2024	\$1,001 - \$15,000	n/a
34	Joint	MANLX	Blackrock National Muni I	Sale (Partial)	01/29/2024	\$1,001 - \$15,000	n/a
35	Joint	MANLX	Blackrock National Muni I	Sale (Partial)	01/08/2024	\$1,001 - \$15,000	n/a
36	Joint	--	Conestoga Small Cap Fund Institutional Class	Sale (Partial)	06/20/2024	\$15,001 - \$50,000	n/a
37	Joint	DODGX	Dodge & Cox Stock Fund	Sale (Full)	03/21/2024	\$1,001 - \$15,000	n/a
38	Joint	--	Glenmede Ptf's Muni Intermediate Portfolio	Sale (Full)	06/28/2024	\$50,001 - \$100,000	n/a
39	Joint	GQGIX	Gqg Partners Emerging	Sale (Full)	01/24/2024	\$50,001 -	n/a

#	Owner	Ticker	Emerging Markets Equity Fund Instit	Transaction Type	Transaction Date	\$100,000 Amount	Comments
40	Joint	BMVP	Invesco Bloomberg Mvp Multi-Factor ETF	Sale (Partial)	01/08/2024	\$1,001 - \$15,000	n/a
41	Joint	POLIX	Polen Growth Fund Institutional Class	Sale (Partial)	06/20/2024	\$15,001 - \$50,000	n/a
42	Joint	VAIPX	Vanguard Inflation Protected Securities Fund Adm	Sale (Partial)	06/20/2024	\$15,001 - \$50,000	n/a
43	Joint	VAIPX	Vanguard Inflation Protected Securities Fund Adm	Sale (Partial)	01/29/2024	\$1,001 - \$15,000	n/a
44	Joint	NARAX	Virtus Newfleet Multi-Sector Short Term Bond Fun	Sale (Partial)	03/21/2024	\$1,001 - \$15,000	n/a
45	Joint	NARAX	Virtus Newfleet Multi-Sector Short Term Bond Fun	Sale (Partial)	01/30/2024	\$1,001 - \$15,000	n/a
46	Joint	NARAX	Virtus Newfleet Multi-Sector Short Term Bond Fun	Sale (Partial)	01/08/2024	\$1,001 - \$15,000	n/a
47	Joint	ABCIX	American Beacon The London Company Income Equity	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
48	Joint	GFAFX	The Growth Fund of America Class F-1 Shares	Sale (Partial)	12/20/2024	\$15,001 - \$50,000	n/a

49 #	Joint Owner	MALOX Ticker	Blackrock Asset Name Global Alloc I	Transaction Sale Type (Partial)	Transaction 12/20/2024 Date	\$1,001 - Amount \$15,000	n/a Comments
50	Joint	MALOX	Blackrock Global Alloc I	Sale (Partial)	07/18/2024	\$1,001 - \$15,000	n/a
51	Joint	GTCSX	Glenmede Small Capitalization Equity Portfolio A	Purchase	12/16/2024	\$1,001 - \$15,000	n/a
52	Joint	GQEIX	Gqg Partners US Select Quality Equity Fund Insti	Purchase	12/18/2024	\$1,001 - \$15,000	n/a
53	Joint	POLIX	Polen Growth Fund Institutional Class	Purchase	12/04/2024	\$1,001 - \$15,000	n/a
54	Child	WCMIX	WCM Focused International Growth Fund Insti Cl	Sale (Partial)	12/06/2024	\$1,001 - \$15,000	n/a
55	Joint	WCMIX	WCM Focused International Growth Fund Insti Cl	Purchase	12/06/2024	\$15,001 - \$50,000	n/a
56	Child	DODGX	Dodge & Cox Stock Fund	Purchase	12/19/2024	\$1,001 - \$15,000	n/a
57	Child	HNACX	Harbor Capital Appreciation Fund - Retirement Cl	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
58	Child	VOO	S&P 500 ETF Vanguard	Purchase	02/14/2024	\$1,001 - \$15,000	n/a
59	Spouse	--	BlackRock Moderate Portfolio Option - A	Sale (Full)	12/31/2024	\$1,001 - \$15,000	Held by 529 Account Child #3
60	Spouse	--	BlackRock	Sale (Full)	12/31/2024	\$1,001 -	Held by 529 Account Child #3

#	Owner	Ticker	Growth Portfolio Asset Name	Transaction Type	Transaction Date	Amount	Comments
61	Spouse	--	BlackRock College 2020 Option - A	Sale (Full)	12/31/2024	\$15,001 -\$50,000	Held by 529 Account Child #3

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	2011	Joint	Mortgage	0	4.25% (30 years)	\$50,001 -\$100,000	Wells Fargo Bank Anchorage, AK	n/a
2	2013	Joint	Mortgage	0	3.375% (30 years)	\$250,001 -\$500,000	Wells Fargo Anchorage, AK	n/a
3	2021	Joint	Mortgage	0	2.99% (30 years)	\$250,001 -\$500,000	CrossCountry Mortgage, LLC Brecksville, OH	n/a
4	2024	Joint	Revolving Charge	-	11.4% (NA)	\$15,001 -\$50,000	USAA San Antonio, TX	n/a

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 2004 to present	Other (Advisory Member)	Thomas C. and Sandra S. Sullivan Foundation Cleveland, OH	Nonprofit Organization	n/a
2	Aug 2018 to present	Other (Chairman)	International Republican Institute Washington, DC	Nonprofit Organization	n/a
3	Oct 2020 to Feb 2024	Other (Staff Officer)	Marine Forces Pacific Command Camp Smith, HI	Other (United States Marine Corps Reserves)	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.