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Annual Report for Calendar 2024

The Honorable Debra S Fischer (Fischer, Deb)

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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? **Yes**

| # | Who Was Paid | Type | Who Paid | Amount Paid | Comments |
|---|--------------|--------|---|-------------|----------|
| 1 | Spouse | Salary | Sunny Slope Ranch, Inc Valentine, NE | > \$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 | Wells Fargo (Valentine, NE) | Bank Deposit | Joint | \$15,001 - \$50,000 | Interest, | None (or less) |

| | Type: Checking, Asset | Asset Type | Owner | Value | Income Type | (\$1,000 than \$201)ne |
|-----|--|--|--------|--|---|------------------------------------|
| 2 | Rocky Ford Land <i>Description: Agricultural Land (Valentine, NE)</i> | Real Estate Unimproved Land | Joint | \$15,001 - \$50,000 | None, None (or less than \$201) | |
| 3 | Union Bank & Trust (Lincoln, NE) <i>Type: Checking,</i> | Bank Deposit | Joint | None (or less than \$1,001) | Interest, | \$201 - \$1,000 |
| 4 | Sunny Slope Ranch, Inc <i>Company: Sunny Slope Ranch, Inc. (Valentine, NE) Description: Ranching</i> | Corporate Securities Non-Public Stock | Self | \$1,000,001 - \$5,000,000 | None, None (or less than \$201) | |
| 5 | Sunny Slope Ranch, Inc <i>Company: Sunny Slope Ranch, Inc (Valentine, NE) Description: Ranching</i> | Corporate Securities Non-Public Stock | Spouse | Over \$1,000,000 and held independently by spouse or dependent child | None, None (or less than \$201) | |
| 6 | Wells Fargo (Valentine, NE) <i>Type: Savings,</i> | Bank Deposit | Joint | \$15,001 - \$50,000 | Interest, | None (or less than \$201) |
| 7 | Debra Fischer Beneficiary IRA | Retirement Plans IRA | Self | | | |
| 7.1 | <u>DCCIX</u> - Delaware Small Cap Core Fund Institutional | Mutual Funds Mutual Fund | Self | \$1,001 - \$15,000 | None, None (or less than \$201) | |
| 7.2 | <u>ICEIX</u> - Ivy International Core Equity Fund Class I | Mutual Funds Mutual Fund | Self | \$1,001 - \$15,000 | None, None (or less than \$201) | |
| 7.3 | <u>LASYX</u> - Loomis Sayles Strategic Alpha Fund Class Y | Mutual Funds Mutual Fund | Self | \$1,001 - \$15,000 | None, None (or less than \$201) | |
| 7.4 | <u>LSWWX</u> - Loomis Sayles Global Allocation Fund Class Y | Mutual Funds Mutual Fund | Self | \$1,001 - \$15,000 | None, None (or less than \$201) | |
| 7.5 | <u>NERYX</u> - Loomis Sayles Core Plus Bond Fd Cl Y | Mutual Funds Mutual Fund | Self | \$1,001 - \$15,000 | None, None (or less than \$201) | |
| 7.6 | <u>PARWX</u> - Paragon Fund | Mutual Funds | Self | \$1,001 - \$15,000 | None, None (or less than \$201) | |

| | | | | | | |
|------|---|---|---------------|-----------------------------|-------------------|---------------------------|
| 7.6 | PARN - Parnassus Endeavor Fund - Investor Shares Asset | Mutual Funds Mutual Fund Asset Type | Self Owner | \$1,001 - \$15,000 Value | None, Income Type | None (or less than \$201) |
| 7.7 | PONPX - Pimco Income Fund Class I-2 | Mutual Funds Mutual Fund | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 7.8 | PRWCX - T. Rowe Price Capital Appreciation Fund | Mutual Funds Mutual Fund | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 7.9 | THIX - Thornburg Limited Term Income Fd Cl I Shs | Mutual Funds Mutual Fund | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 7.10 | TOWN BANK NATIONAL ASSSOCIATION (HEARTLAND, WI) <i>Type: IRA Cash Accounts,</i> | Bank Deposit | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 7.11 | FJNUEX FIRST TRUST VEST NASDAQ 100 BUFFERED 20,10 | Mutual Funds Mutual Fund | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 7.12 | FSVGBX FIRST TRUST VEST LARGE CAP DEEP BUFFERED 20, 56 | Mutual Funds Mutual Fund | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 8 | LPL Financial | Brokerage/Managed Account | Joint | | | |
| 8.1 | XLE - SPDR Select Sector Fund - Energy Select Sector | Mutual Funds Exchange Traded Fund/Note | Joint | \$15,001 - \$50,000 | Dividends, | \$201 - \$1,000 |
| 8.2 | BIL - SPDR Bloomberg 1-3 Month T-Bill ETF | Mutual Funds Mutual Fund | Joint | \$15,001 - \$50,000 | Dividends, | \$1,001 - \$2,500 |
| 8.3 | SPEM - SPDR Emerging Markets Portfolio ETF | Mutual Funds Mutual Fund | Joint | \$15,001 - \$50,000 | Dividends, | \$1,001 - \$2,500 |
| 8.4 | SPDW - SPDR Portfolio Developed World ex-US ETF | Mutual Funds Exchange Traded Fund/Note | Joint | \$15,001 - \$50,000 | Dividends, | \$1,001 - \$2,500 |
| 8.5 | SPYG - SPDR S&P 500 Growth Portfolio ETF | Mutual Funds Exchange Traded Fund/Note | Joint | \$50,001 - \$100,000 | Dividends, | \$201 - \$1,000 |

| Funds/Notes | | | | | | |
|-------------|--|---|-------|-----------------------------|-------------|---------------------------|
| | | Asset Type | Owner | Value | Income Type | Income |
| 8.6 | SPY - SPDR S&P 500 Value Portfolio ETF | Mutual Funds Exchange Traded Fund/Note | Joint | \$15,001 - \$50,000 | Dividends, | \$201 - \$1,000 |
| 8.7 | SLYV - SPDR S&P 600 Small Cap Growth ETF (based on S&P Sm) | Mutual Funds Exchange Traded Fund/Note | Joint | \$15,001 - \$50,000 | Dividends, | \$201 - \$1,000 |
| 8.8 | SLYV - SPDR S&P 600 Small Cap Value ETF (based on S&P Sma) | Mutual Funds Exchange Traded Fund/Note | Joint | \$15,001 - \$50,000 | Dividends, | \$201 - \$1,000 |
| 8.9 | XME - SPDR S&P Metals & Mining ETF | Mutual Funds Exchange Traded Fund/Note | Joint | \$15,001 - \$50,000 | Dividends, | \$201 - \$1,000 |
| 8.10 | XOP - SPDR S&P Oil & Gas Explor & Product | Mutual Funds Exchange Traded Fund/Note | Joint | \$15,001 - \$50,000 | Dividends, | \$201 - \$1,000 |
| 8.11 | RAAX - Vanec Inflation Allocation ETF | Mutual Funds Exchange Traded Fund/Note | Joint | \$15,001 - \$50,000 | Dividends, | \$201 - \$1,000 |
| 8.12 | Truist Bank (Fort Mill, SC) <i>Type: Money Market Account,</i> | Bank Deposit | Joint | None (or less than \$1,001) | Interest, | None (or less than \$201) |
| 8.13 | Citibank NA (New Castle, Delaware) <i>Type: Brokerage Sweep Account,</i> | Bank Deposit | Joint | None (or less than \$1,001) | Interest, | None (or less than \$201) |
| 8.14 | FJCRRX FIRST TRUST CBOE VEST LARGE CAP DEEP BUFFERED 20, 39 | Mutual Funds Mutual Fund | Joint | None (or less than \$1,001) | Dividends, | \$201 - \$1,000 |
| 8.15 | FZBZQX FIRST TRUST CBOE VEST LARGE CAP DEEP BUFFERED 30, 12 | Mutual Funds Mutual Fund | Joint | None (or less than \$1,001) | Dividends, | \$201 - \$1,000 |
| 8.16 | US BANK NATIONAL ASSOCIATION (ST PAUL, MINNESOTA) <i>Type: Brokerage Sweep Account,</i> | Bank Deposit | Joint | \$1,001 - \$15,000 | Interest, | \$201 - \$1,000 |
| 8.17 | FYUORX FIRST TRUST VEST SMALL CAP BUFFERED 20, 5 | Mutual Funds Mutual Fund | Joint | \$15,001 - \$50,000 | Dividends, | \$201 - \$1,000 |
| 8.18 | FPDNTX FIRST TRUST VEST NASDAQ 100 BUFFERED 20, 17 | Mutual Funds Mutual Fund | Joint | \$1,001 - \$15,000 | Dividends, | \$201 - \$1,000 |
| 9 | Note Receivable | Accounts | Joint | \$100,001 - \$250,000 | Interest, | \$5,001 |

| | | | | | |
|--|---|-------|-------|----------------|--------------------|
| Company: Sunny Slope Ranch Inc (Valentine, Nebraska) Asset | Receivable From a Business Asset Type | Owner | Value | Income Type | \$15,000 Income |
|--|---|-------|-------|----------------|--------------------|

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 | Self | PONPX | Pimco Income Fund Class I-2 | Sale (Full) | 04/30/2024 | \$1,001 - \$15,000 | n/a |
| 2 | Self | THIIX | Thornburg Limited Term Income Fd Cl I Shs | Sale (Full) | 04/30/2024 | \$1,001 - \$15,000 | n/a |
| 3 | Joint | -- | FJCRRX FIRST TRUST CBOE VEST LARGE CAP DEEP BUFFERED 20, 39 | Sale (Full) | 11/26/2024 | \$15,001 - \$50,000 | n/a |
| 4 | Joint | -- | FZBZQX FIRST TRUST CBOE VEST LARGE CAP DEEP BUFFERED 30, 12 | Sale (Full) | 12/03/2024 | \$1,001 - \$15,000 | n/a |
| 5 | Joint | -- | FYUORX FIRST TRUST VEST SMALL CAP BUFFERED | Purchase | 12/10/2024 | \$15,001 - \$50,000 | n/a |

| # | Owner | Ticker | Asset | Transaction | | Amount | Comments |
|---|-------|--------|----------|-------------|------------|----------|----------|
| | | | | Name | Type | | |
| 6 | Joint | -- | FPDNTX | Purchase | 12/17/2024 | \$1,001 | n/a |
| | | | FIRST | | | - | |
| | | | TRUST | | | \$15,000 | |
| | | | VEST | | | | |
| | | | NASDAQ | | | | |
| | | | 100 | | | | |
| | | | BUFFERED | | | | |
| | | | 20, 17 | | | | |
| 7 | Self | -- | FJNUEX | Purchase | 05/08/2024 | \$1,001 | n/a |
| | | | FIRST | | | - | |
| | | | TRUST | | | \$15,000 | |
| | | | VEST | | | | |
| | | | NASDAQ | | | | |
| | | | 100 | | | | |
| | | | BUFFERED | | | | |
| | | | 20, 10 | | | | |
| 8 | Self | -- | FSVGBX | Purchase | 05/13/2024 | \$1,001 | n/a |
| | | | FIRST | | | - | |
| | | | TRUST | | | \$15,000 | |
| | | | VEST | | | | |
| | | | LARGE | | | | |
| | | | CAP DEEP | | | | |
| | | | BUFFERED | | | | |
| | | | 20, 56 | | | | |

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 | 2020 | Joint | Mortgage | 0 | 2.75% (15 years) | \$250,001 - \$500,000 | Regions Bank Hattiesburg, MS | 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? **This is not my first report.**

Attachments & Comments

No attachments added.

No comments added.