Filing ID #10071852

Financial Disclosure Report

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

Filer Information

Name: Hon. George Whitesides
Status: Member
State/District: CA27

Filing Information

Filing Type: New Filer Report
Filing Year: 2024
Filing Date: 08/13/2025

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
529 College Savings Plan - GW UBS ⇒ College America 529 2027 [5F] Location: CA		$15,001 - $50,000	Tax-Deferred		
529 College Savings Plan - GW UBS ⇒ College America 529 2027 F2 [5F] Location: CA		$250,001 - $500,000	Tax-Deferred		
529 College Savings Plan - MW UBS ⇒ College America 529 2030 A [5F] Location: CA		$15,001 - $50,000	Tax-Deferred		
529 College Savings Plan - MW UBS ⇒ College America 529 2030 F2 [5F] Location: CA		$250,001 - $500,000	Tax-Deferred		
Checking Account - Bank of America ⇒ Cash [BA]		$50,001 - $100,000	Interest	Not Applicable	$201 - $1,000
Checking Account - E*Trade ⇒ Cash [BA]		$50,001 - $100,000	None		
Cormorant Nest LLC ⇒		$100,001 -	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Free Wilbur LLC [HE]		$250,000			
COMMENTS: This is an illiquid investment.					
Cormorant Nest LLC ⇒ Nikola Venus [HE]		$100,001 - $250,000	None		
COMMENTS: This is an illiquid investment.					
George T Whitesides Direct Investments ⇒ Convective Capital Fund I, L.P. [HE]		None	Capital Gains	Not Applicable	$100,001 - $1,000,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I sold my ownership in this fund as of 12/31/24.					
George Whitesides IRA ⇒ Avantis U.S. Small Cap Value ETF (AVUV) [EF]		$15,001 - $50,000	Tax-Deferred		
George Whitesides IRA ⇒ DoubleLine Core Fixed Income Fund Class I (DBLFX) [MF]		$1,001 - $15,000	Tax-Deferred		
George Whitesides IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		$100,001 - $250,000	Tax-Deferred		
George Whitesides IRA ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]		$15,001 - $50,000	Tax-Deferred		
George Whitesides IRA ⇒ Invesco S&P 500 Quality ETF (SPHQ) [EF]		$50,001 - $100,000	Tax-Deferred		
George Whitesides IRA ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]		$15,001 - $50,000	Tax-Deferred		
George Whitesides IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		$15,001 - $50,000	Tax-Deferred		
George Whitesides IRA ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]		$100,001 - $250,000	Tax-Deferred		
George Whitesides IRA ⇒ iShares Russell 1000 Value ETF (IWD) [EF]		$15,001 - $50,000	Tax-Deferred		
George Whitesides IRA ⇒ MFS International Growth Fund - Class I (MQGIX) [MF]		$1,001 - $15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
George Whitesides IRA ⇒ Money Market Fund Fdic Rfim [BA]		$1,001 - $15,000	Tax-Deferred		
George Whitesides IRA ⇒ Pacer US Cash Cows 100 ETF (COWZ) [EF]		$1,001 - $15,000	Tax-Deferred		
George Whitesides IRA ⇒ SPDR Blackstone Senior Loan ETF (SRLN) [EF]		$15,001 - $50,000	Tax-Deferred		
George Whitesides IRA ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		$1,001 - $15,000	Tax-Deferred		
George Whitesides IRA ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]		$1,001 - $15,000	Tax-Deferred		
George Whitesides IRA ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		$15,001 - $50,000	Tax-Deferred		
George Whitesides IRA ⇒ Vanguard S&P 500 ETF (VOO) [EF]		$250,001 - $500,000	Tax-Deferred		
GTW General UBS ⇒ Franklin Managed Trust Rising Dividends Fund Cl A (FRDPX) [MF]		$500,001 - $1,000,000	Dividends	Not Applicable	$5,001 - $15,000
GTW General UBS ⇒ Innoviva, Inc. - Common Stock (INVA) [ST]		$50,001 - $100,000	None		
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW General UBS ⇒ The Growth Fund of America Class A Shares (AGTHX) [MF]		$1,000,001 - $5,000,000	Dividends	Not Applicable	$5,001 - $15,000
GTW General UBS ⇒ Theravance Biopharma, Inc. - Ordinary Shares (TBPH) [ST]		$15,001 - $50,000	None		
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW General UBS ⇒ UBS SELECT TREASURY INSTITUTIONAL FUND [BA]		$1,000,001 - $5,000,000	Dividends	Not Applicable	$5,001 - $15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
COMMENTS: money market fund					
GTW General UBS ⇒ Vanguard Target Retirement 2045 Fund (VTIVX) [MF]		$15,001 - $50,000	Tax-Deferred		
GTW General UBS ⇒ Virgin Galactic Holdings, Inc. Common Stock (SPCE) [ST]		$1,001 - $15,000	None		
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW General UBS ⇒ Washington Mutual Invs Fd Cl A Shs (AWSHX) [MF]		$1,000,001 - $5,000,000	Dividends	Not Applicable	$15,001 - $50,000
GTW Stock Account UBS ⇒ American Electric Power Company, Inc. (AEP) [ST]		$15,001 - $50,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Bank of America Corporation Common Stock (BAC) [ST]		$15,001 - $50,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Chubb Limited Common Stock (CB) [ST]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Citigroup, Inc. Common Stock (C) [ST]		$15,001 - $50,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Coca-Cola Company (KO) [ST]		$50,001 - $100,000	Dividends	Not Applicable	$2,501 - $5,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]		$50,001 - $100,000	Dividends	Not Applicable	$2,501 - $5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Diageo plc Common Stock (DEO) [ST]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Home Depot, Inc. (HD) [ST]		$100,001 - $250,000	Dividends	Not Applicable	$2,501 - $5,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Intel Corporation - Common Stock (INTC) [ST]		$15,001 - $50,000	None		
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ iShares Biotechnology ETF (IBB) [EF]		$100,001 - $250,000	Dividends	Not Applicable	$201 - $1,000
GTW Stock Account UBS ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		$100,001 - $250,000	Dividends	Not Applicable	$2,501 - $5,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Linde plc - Ordinary Shares (LIN) [ST]		$100,001 - $250,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		$100,001 - $250,000	Dividends	Not Applicable	$2,501 - $5,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Marsh & McLennan Companies, Inc. Common Stock (MMC) [ST]		$100,001 - $250,000	Dividends	Not Applicable	$2,501 - $5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ McDonald's Corporation Common Stock (MCD) [ST]		$100,001 - $250,000	Dividends	Not Applicable	$2,501 - $5,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		$500,001 - $1,000,000	Dividends	Not Applicable	$2,501 - $5,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Novartis AG Common Stock (NVS) [ST]		$50,001 - $100,000	Dividends	Not Applicable	$2,501 - $5,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Procter & Gamble Company (PG) [ST]		$100,001 - $250,000	Dividends	Not Applicable	$2,501 - $5,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Republic Services, Inc. Common Stock (RSG) [ST]		$100,001 - $250,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Rockwell Automation, Inc. Common Stock (ROK) [ST]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
GTW Stock Account UBS ⇒ Royal Caribbean Cruises Ltd. Common Stock (RCL) [ST]		$100,001 - $250,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ RTX Corporation Common Stock (RTX) [ST]		$15,001 - $50,000	Dividends	Not Applicable	$201 - $1,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ SANDOZ GROUP AG S/ADR (SDZNY) [ST]		$1,001 - $15,000	None		
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Texas Instruments Incorporated - Common Stock (TXN) [ST]		$50,001 - $100,000	Dividends	Not Applicable	$2,501 - $5,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ UBS Insured Sweep Program [BA]		$1,001 - $15,000	None		
COMMENTS: money market fund					
GTW Stock Account UBS ⇒ UBS SELECT TREASURY INSTITUTIONAL FUND [BA]		$100,001 - $250,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: money market fund					
GTW Stock Account UBS ⇒ Union Pacific Corporation Common Stock (UNP) [ST]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Visa Inc. (V) [ST]		$15,001 - $50,000	Dividends	Not Applicable	$201 - $1,000
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
GTW Stock Account UBS ⇒ Walt Disney Company (DIS) [ST]		$15,001 - $50,000	Dividends	Not Applicable	$201 - $1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this security on 3/24/25.					
Hummingbird Circle Trust ⇒ Avantis U.S. Small Cap Value ETF (AVUV) [EF]		$1,001 - $15,000	None		
Hummingbird Circle Trust ⇒ Federated Treasury Obligations [BA]		$500,001 - $1,000,000	Interest	Not Applicable	$15,001 - $50,000
Hummingbird Circle Trust ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		$250,001 - $500,000	Dividends	Not Applicable	$1,001 - $2,500
Hummingbird Circle Trust ⇒ Invesco S&P 500 Equal Weight ETF (RSP) [EF]		$100,001 - $250,000	Dividends	Not Applicable	$1,001 - $2,500
Hummingbird Circle Trust ⇒ Invesco S&P 500 Quality ETF (SPHQ) [EF]		$250,001 - $500,000	Dividends	Not Applicable	$2,501 - $5,000
Hummingbird Circle Trust ⇒ iShares Core S&P Mid-Cap ETF (IJH) [EF]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
Hummingbird Circle Trust ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
Hummingbird Circle Trust ⇒ iShares MSCI USA Quality Factor ETF (QUAL) [EF]		$250,001 - $500,000	Dividends	Not Applicable	$1,001 - $2,500
Hummingbird Circle Trust ⇒ iShares Russell 1000 Value ETF (IWD) [EF]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
Hummingbird Circle Trust ⇒ JPMorgan Ultra-Short Municipal Fund I Class (USMTX) [MF]		$1,000,001 - $5,000,000	Dividends, Interest	Not Applicable	$2,501 - $5,000
Hummingbird Circle Trust ⇒ Money Market Fund Fdic Rfim [BA]		$15,001 - $50,000	Interest	Not Applicable	$5,001 - $15,000
Hummingbird Circle Trust ⇒ Netflix, Inc. - Common Stock (NFLX) [ST]		$100,001 - $250,000	None		
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this position on 3/24/25.					
Hummingbird Circle Trust ⇒		$15,001 - $50,000	Dividends	Not Applicable	$1,001 - $2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Pacer US Cash Cows 100 ETF (COWZ) [EF]					
Hummingbird Circle Trust ⇒ Planet Labs PBC Class A Common Stock (PL) [ST]		$100,001 - $250,000	None		
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. I sold this position on 3/27/25.					
Hummingbird Circle Trust ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
Hummingbird Circle Trust ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]		$15,001 - $50,000	Dividends	Not Applicable	$201 - $1,000
Hummingbird Circle Trust ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		$100,001 - $250,000	Dividends	Not Applicable	$201 - $1,000
Hummingbird Circle Trust ⇒ United States Treas Bills B/E DTD [GS]		None	Interest	Not Applicable	$5,001 - $15,000
Hummingbird Circle Trust ⇒ USD Cash [BA]		$1,001 - $15,000	None		
Hummingbird Circle Trust ⇒ VanEck Semiconductor ETF (SMH) [EF]		$50,001 - $100,000	Dividends	Not Applicable	$201 - $1,000
Hummingbird Circle Trust ⇒ Vanguard Div Appreciation ETF (VIG) [EF]		$50,001 - $100,000	Dividends	Not Applicable	$1,001 - $2,500
Hummingbird Circle Trust ⇒ Vanguard ESG U.S. Stock ETF (ESGV) [EF]		$500,001 - $1,000,000	Dividends	Not Applicable	$5,001 - $15,000
Hummingbird Circle Trust ⇒ Vanguard S&P 500 ETF (VOO) [EF]		$50,001 - $100,000	Dividends	Not Applicable	$201 - $1,000
Hummingbird Circle Trust ⇒ WCM Focused International Growth Fund Insti Cl (WCMIX) [MF]		$15,001 - $50,000	None		
Loretta Whitesides Direct Investments ⇒ Space Forge (GBP) [HE]	SP	$50,001 - $100,000	None		
COMMENTS: This is an illiquid investment.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Loretta Whitesides Individual ⇒ Innoviva, Inc. - Common Stock (INVA) [ST]	SP	$250,001 - $500,000	None		
COMMENTS: To avoid any possible conflicts of interest with my future Congressional work, I'm transitioning my single stock, company-specific holdings into passive ETFs and mutual funds, per best practices. My wife sold this security on 3/25/25.					
Loretta Whitesides Individual ⇒ Redwood Credit Union Checking [BA]	SP	$100,001 - $250,000	None		
Loretta Whitesides Vanguard UBS ⇒ UBS Insured Sweep Prgm [BA]	SP	$100,001 - $250,000	Interest	Not Applicable	$201 - $1,000
Loretta Whitesides Vanguard UBS ⇒ Vanguard FTSE All World Ex US ETF (VEU) [EF]	SP	$500,001 - $1,000,000	Dividends	Not Applicable	$15,001 - $50,000
Loretta Whitesides Vanguard UBS ⇒ Vanguard FTSE All-Wld ex-US SmCp Idx ETF (VSS) [EF]	SP	$100,001 - $250,000	Dividends	Not Applicable	$5,001 - $15,000
Loretta Whitesides Vanguard UBS ⇒ Vanguard FTSE Emerging Markets ETF (VWO) [EF]	SP	$250,001 - $500,000	Dividends	Not Applicable	$5,001 - $15,000
Loretta Whitesides Vanguard UBS ⇒ Vanguard Growth ETF (VUG) [EF]	SP	$500,001 - $1,000,000	Dividends	Not Applicable	$1,001 - $2,500
Loretta Whitesides Vanguard UBS ⇒ Vanguard High Dividend Yield ETF (VYM) [EF]	SP	$250,001 - $500,000	Dividends	Not Applicable	$5,001 - $15,000
Loretta Whitesides Vanguard UBS ⇒ Vanguard Mega Cap Growth ETF (MGK) [EF]	SP	$500,001 - $1,000,000	Dividends	Not Applicable	$2,501 - $5,000
Loretta Whitesides Vanguard UBS ⇒ Vanguard Mega Cap Value ETF (MGV) [EF]	SP	$250,001 - $500,000	Dividends	Not Applicable	$5,001 - $15,000
Loretta Whitesides Vanguard UBS ⇒ Vanguard Mid-Cap Growth ETF (VOT) [EF]	SP	$250,001 - $500,000	Dividends	Not Applicable	$1,001 - $2,500
Loretta Whitesides Vanguard UBS ⇒ Vanguard Mid-Cap Value ETF (VOE) [EF]	SP	$250,001 - $500,000	Dividends	Not Applicable	$5,001 - $15,000
Loretta Whitesides Vanguard UBS ⇒ Vanguard Small-Cap Growth ETF (VBK) [EF]	SP	$100,001 - $250,000	Dividends	Not Applicable	$1,001 - $2,500
Loretta Whitesides Vanguard UBS ⇒	SP	$100,001 -	Dividends	Not Applicable	$2,501 - $5,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Vanguard Small-Cap Value ETF (VBR) [EF]		$250,000			
Loretta Whitesides Vanguard UBS ⇒ Vanguard Value ETF (VTV) [EF]	SP	$250,001 - $500,000	Dividends	Not Applicable	$5,001 - $15,000
Osprey Circle LLC ⇒ Atreides Foundation Fund, LP [HE] COMMENTS: This is an illiquid investment.		$1,000,001 - $5,000,000	None		
Osprey Circle LLC ⇒ Bridge Inv Group - Workforce Housing II International Fund [HE] COMMENTS: This is an illiquid investment.		$250,001 - $500,000	Dividends	Not Applicable	$5,001 - $15,000
Osprey Circle LLC ⇒ Celestial Citizen (USD) [HE] COMMENTS: This is an illiquid investment.		$15,001 - $50,000	None		
Osprey Circle LLC ⇒ Foresite Capital Management VI LLC [HE] COMMENTS: This is an illiquid investment.		$100,001 - $250,000	None		
Osprey Circle LLC ⇒ Hawk Ridge Partners II LP [HE] COMMENTS: This is an illiquid investment.		$500,001 - $1,000,000	None		
Osprey Circle LLC ⇒ NB Secondary Opportunities Fund V LP [HE] COMMENTS: This is an illiquid investment.		$250,001 - $500,000	Dividends	Not Applicable	$15,001 - $50,000
Osprey Circle LLC ⇒ Pomona Investment Fund [HE] COMMENTS: This is an illiquid investment.		$500,001 - $1,000,000	Dividends	Not Applicable	$15,001 - $50,000
Osprey Circle LLC ⇒ Summit Partners [HE] COMMENTS: This is an illiquid investment.		$500,001 - $1,000,000	None		

* 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 Current Year to Filing	Amount Preceding Year
Virgin Galactic (formerly: Galactic Co.) Comments: Income received in 2024.	Bonus	N/A	$500,000.00

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	UBS Comments: Outstanding mortgage balance	5/2020	Mortgage	$1,000,001 - $5,000,000
JT	UBS Comments: Outstanding mortgage balance	5/2022	Mortgage	$1,000,001 - $5,000,000
JT	UBS Comments: Paid off in full in 2024.	4/1/22	Line of Credit	$250,001 - $500,000

Schedule E: Positions

Position	Name of Organization
Board Chairman Comments: Not Current	Megafire Action
Partner Comments: Not Current	Convective Capital
Board Member Comments: Not Current	Antelope Valley Economic Development & Growth Enterprise
Co-Founder Comments: Not Current	Mission AstroAccess
Co-Founder Comments: Not Current	Aerospace Workshop, B3K Prosperity
Advisory Board Comments: Not Current	Alliance for SoCal Innovation

Position	Name of Organization
Space Innovation Council Comments: Not Current	CalTech
Advisory Council Comments: Not Current	Mechanical and Aerospace Engineering Department, Princeton University
Specific Advisory Board Comments: Not Current	Space-Based Solar Power Project, CalTech
Mentor Comments: Not Current	Matthew Isakowitz Fellowship Program
Advisory Council Member Comments: Not Current	Aurelia Institute
Manager Comments: Not Current	Bluebird B LLC
Member	Osprey LLC
Member	Space Love LLC
Advisory Council Member Comments: Not Current	Giant Magellan Telescope
Mentor Comments: Not Current	Brooke Owens Fellowship
Chairman Comments: Not Current	Space Advisory Board, Virgin Galactic

Schedule F: Agreements

Date	Parties To	Terms of Agreement
2020	Virgin Galactic LLC, Virgin Galactic Holdings,George Whitesides	Tickets (2) for rocket-powered spaceflight.

Schedule J: Compensation in Excess of $5,000 Paid by One Source

Source (Name and Address)	Brief Description of Duties
Galactic Enterprises LLC (Las Cruces, NM, US)	Advisory Position (Not Current)

Schedule A Investment Vehicle Details

- 529 College Savings Plan - GW UBS
  Location: CA
- Loretta Whitesides Direct Investments (Owner: SP)
  Location: US
- George Whitesides IRA
  Location: US
- Hummingbird Circle Trust
  Location: US
- Osprey Circle LLC
  Location: US
- George T Whitesides Direct Investments
  Location: US
- Cormorant Nest LLC
  Location: US
- 529 College Savings Plan - MW UBS
  Location: CA
- Loretta Whitesides Vanguard UBS (Owner: SP)
  Location: US
- GTW General UBS
  Location: US
- GTW Stock Account UBS
  Location: US
- Loretta Whitesides Individual (Owner: SP)
- Checking Account - E*Trade
- Checking Account - Bank of America

Exclusions of Spouse, Dependent, or Trust Information

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. George Whitesides , 08/13/2025