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Annual Report for Calendar 2024

The Honorable Jerry Moran (Moran, Jerry)

Filed 05/15/2025 @ 5:20 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 | Board Compensation | Garden City Company Garden City, Kansas | > \$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 |
|-------|------------|-------|-------|-------------|--------|
|-------|------------|-------|-------|-------------|--------|

| | Asset | Asset Type | Owner | Value | Type | Income |
|-----|--|--|-------|-------------------------|----------------------|---------------------------|
| 1 | Hanston Insurance Agency (Hays, KS) <i>Company:</i> Hanston Insurance Agency (Hays, KS) <i>Description:</i> Bank Holding Company | Corporate Securities Non-Public Stock | Self | \$250,001 - \$500,000 | Income Dividends, | \$5,001 - \$15,000 |
| 2 | Mainstar Trust (Onaga, KS) <i>Type:</i> IRA Cash Accounts, | Bank Deposit | Self | \$500,001 - \$1,000,000 | Interest, | None (or less than \$201) |
| 3 | Astra Bank (Plainville, KS) <i>Type:</i> Money Market Account, | Bank Deposit | Joint | \$50,001 - \$100,000 | Interest, | \$201 - \$1,000 |
| 4 | Bank of Hays (Hays, KS) <i>Type:</i> Checking, | Bank Deposit | Joint | \$1,001 - \$15,000 | Interest, | None (or less than \$201) |
| 5 | Landmark Bank (Manhattan, KS) <i>Type:</i> Savings, | Bank Deposit | Joint | \$1,001 - \$15,000 | Interest, | None (or less than \$201) |
| 6 | Bank of Hays (Hays, KS) <i>Type:</i> Checking, | Bank Deposit | Joint | \$15,001 - \$50,000 | Interest, | None (or less than \$201) |
| 7 | Bank of Hays (Hays, KS) <i>Type:</i> Savings, | Bank Deposit | Joint | \$1,001 - \$15,000 | Interest, | None (or less than \$201) |
| 8 | Bank of Hays (Hays, ks) <i>Type:</i> Money Market Account, | Bank Deposit | Joint | \$1,001 - \$15,000 | Interest, | \$201 - \$1,000 |
| 9 | Raymond James IRA | Retirement Plans IRA | Self | | | |
| 9.1 | CGDG - Capital Group Dividend Growers ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 9.2 | CGDV - Capital Group Dividend Value ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 9.3 | DFIV - Dimensional International Value ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$50,001 - \$100,000 | None, | None (or less than \$201) |

| | | | | | | |
|------|--|--|---------------|-----------------------------------|---------------|------------------------------------|
| 9.4 | DFAT - Dimensional U.S. Targeted Value ETF Asset | Mutual Funds Exchange Traded Fund/Note | Self Owner | \$15,001 - \$50,000 | None, Type | None (or less than \$201) |
| 9.5 | BRK.B - Berkshire Hathaway CI B | Corporate Securities Stock | Self | \$50,001 - \$100,000 | None, | None (or less than \$201) |
| 9.6 | DFEV - Dimensional Emerging Markets Value ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 9.7 | DFSV - Dimensional US Small Cap Value ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 9.8 | VGSH - Vanguard Short-Term Treasury ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$50,001 - \$100,000 | None, | None (or less than \$201) |
| 9.9 | DXJ - WisdomTree Japan Hedged Equity Fund | Mutual Funds Exchange Traded Fund/Note | Self | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 9.10 | AMRFX - American Mutual Fund Class F-2 Shares | Mutual Funds Mutual Fund | Self | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 9.11 | ICAFX - The Investment Company of America Class F-2 Shs | Mutual Funds Mutual Fund | Self | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 9.12 | DBLSX - Doubleline Low Duration Bond Fund Class I | Mutual Funds Mutual Fund | Self | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 9.13 | CGXU - Capital Group International Focus Equity ETF | Mutual Funds Exchange Traded Fund/Note | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 9.14 | DUHP - Dimensional ETF Trust Dimensional US High Profitab | Mutual Funds Exchange Traded Fund/Note | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 9.15 | VYM - Vanguard High Dividend Yield ETF | Mutual Funds | Self | None (or | None, | None |

| 9.15 | VYM - Vanguard International High Dividend Yield ETF | Mutual Funds Exchange Traded Fund/Note | Self Owner | None (or less than \$1,001) Value | None, Income Type | None (or less than \$201) Income |
|------|--|--|---------------|--|-------------------------|--|
| 9.16 | VYM - Vanguard International High Dividend Yield ETF | Mutual Funds Exchange Traded Fund/Note | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 9.17 | FRSXX - FIMM Treasury Only Port | Mutual Funds Mutual Fund | Self | \$100,001 - \$250,000 | None, | None (or less than \$201) |
| 9.18 | DISVX - Dfa International Small Cap Value Portfolio | Mutual Funds Mutual Fund | Self | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 9.19 | DFS VX - Dfa U.S. Small Cap Value Portfolio | Mutual Funds Mutual Fund | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 9.20 | Raymond James Deposit Program (St. Petersburg, FL) Type: Money Market Account, | Bank Deposit | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 10 | Raymond James RIRA | Retirement Plans IRA | Self | | | |
| 10.1 | BRK.B - Berkshire Hathaway CI B | Corporate Securities Stock | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 10.2 | CGDG - Capital Group Dividend Growers ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 10.3 | CGDV - Capital Group Dividend Value ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 10.4 | DFIV - Dimensional International Value ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 10.5 | DFAT - Dimensional U.S. Targeted Value ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |

| | | | | | | |
|-------|---|--|---------------|-----------------------------------|-------------------------|--|
| 10.6 | DFEV - Dimensional Emerging Markets Value ETF | Mutual Funds Exchange Traded Fund/Note | Self Owner | \$1,001 - \$15,000 | Income None, Type | None Income (or less than \$201) |
| 10.7 | DFSV - Dimensional US Small Cap Value ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 10.8 | VGSH - Vanguard Short-Term Treasury ETF | Mutual Funds Exchange Traded Fund/Note | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 10.9 | DXJ - WisdomTree Japan Hedged Equity Fund | Mutual Funds Exchange Traded Fund/Note | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 10.10 | CGXU - Capital Group International Focus Equity ETF | Mutual Funds Exchange Traded Fund/Note | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 10.11 | DUHP - Dimensional ETF Trust Dimensional US High Profitab | Mutual Funds Exchange Traded Fund/Note | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 10.12 | VYM - Vanguard High Dividend Yield ETF | Mutual Funds Exchange Traded Fund/Note | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 10.13 | VYMI - Vanguard International High Dividend Yield ETF | Mutual Funds Exchange Traded Fund/Note | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 10.14 | DFSVX - Dfa U.S. Small Cap Value Portfolio | Mutual Funds Mutual Fund | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 10.15 | AMRFX - American Mutual Fund Class F-2 Shares | Mutual Funds Mutual Fund | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 10.16 | ICAFX - The Investment Company of America Class F-2 Shs | Mutual Funds Mutual Fund | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |

| | | | | | | |
|-------|---|---|---------------|-----------------------------|-------------------|---------------------------|
| 10.17 | DISVX - Dfa International Small Cap Value Portfolio Asset | Mutual Funds Mutual Fund Asset Type | Self Owner | \$1,001 - \$15,000 Value | None, Income Type | None (or less than \$201) |
| 10.18 | DBLSX - Doubleline Low Duration Bond Fund Class I | Mutual Funds Mutual Fund | Self | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 10.19 | Raymond James Deposit Program (St. Petersburg, FL) Type: Money Market Account, | Bank Deposit | Self | None (or less than \$1,001) | None, | None (or less than \$201) |
| 10.20 | FRSXX - FIMM Treasury Only Port | Mutual Funds Mutual Fund | Self | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 11 | Raymond James IRA | Retirement Plans IRA | Spouse | | | |
| 11.1 | BRK.B - Berkshire Hathaway CI B | Corporate Securities Stock | Spouse | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 11.2 | CGDG - Capital Group Dividend Growers ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 11.3 | CGDV - Capital Group Dividend Value ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 11.4 | DFIV - Dimensional International Value ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 11.5 | DFAT - Dimensional U.S. Targeted Value ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 11.6 | DFEV - Dimensional Emerging Markets Value ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 11.7 | DFSV - Dimensional US Small Cap Value ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |

| | | | | | | |
|-------|--|--|-----------------|-----------------------------------|---------------|------------------------------------|
| | | | | | Income | \$201) |
| 11.8 | Asset VGSH - Vanguard Short-Term Treasury ETF | Asset Type Mutual Funds | Owner Spouse | Value \$15,001 - | Type None, | Income None |
| | | Exchange Traded Fund/Note | | \$50,000 | | (or less than \$201) |
| 11.9 | DXJ - WisdomTree Japan Hedged Equity Fund | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 11.10 | CGXU - Capital Intl Focus Equity ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | None (or less than \$1,001) | None, | None (or less than \$201) |
| 11.11 | DUHP - Dimensional ETF Trust Dimensional US High Profitab | Mutual Funds Exchange Traded Fund/Note | Spouse | None (or less than \$1,001) | None, | None (or less than \$201) |
| 11.12 | VYM - Vanguard High Dividend Yield ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | None (or less than \$1,001) | None, | None (or less than \$201) |
| 11.13 | VYMI - Vanguard International High Dividend Yield ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | None (or less than \$1,001) | None, | None (or less than \$201) |
| 11.14 | Raymond James Deposit Program (St. Petersburg, FL) <i>Type:</i> Money Market Account, | Bank Deposit | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 11.15 | AMRFX - American Mutual Fund Class F-2 Shares | Mutual Funds Mutual Fund | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 11.16 | ICAFX - The Investment Company of America Class F-2 Shs | Mutual Funds Mutual Fund | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 11.17 | DISVX - Dfa International Small Cap Value Portfolio | Mutual Funds Mutual Fund | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 11.18 | DBLSX - Doubleline Low Duration Bond Fund Class I | Mutual Funds Mutual Fund | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |

| | | | | | | |
|-------|--|--|-----------------|---|----------------------|------------------------------|
| 11.19 | DFS VX - Dfa U.S. Small Cap Value Portfolio Asset | Mutual Funds Asset Type Mutual Fund | Spouse Owner | None (or Value less than \$1,001) | None, Income Type | None (or less than \$201) |
| 11.20 | FRSXX - FIMM Treasury Only Port | Mutual Funds Mutual Fund | Spouse | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 12 | Raymond James RIRA | Retirement Plans IRA | Spouse | | | |
| 12.1 | BRK.B - Berkshire Hathaway CI B | Corporate Securities Stock | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.2 | CGDG - Capital Group Dividend Growers ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.3 | CGDV - Capital Group Dividend Value ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.4 | DFIV - Dimensional International Value ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.5 | DFAT - Dimensional U.S. Targeted Value ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.6 | DFEV - Dimensional Emerging Markets Value ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.7 | DFS V - Dimensional US Small Cap Value ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.8 | VGSH - Vanguard Short-Term Treasury ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.9 | DXJ - WisdomTree Japan Hedged Equity Fund | Mutual Funds Exchange Traded Fund/Note | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |

| | Asset | Fund/Note | Owner | Value | Income Type | Income |
|-------|--|--|--------|-----------------------------------|-------------|------------------------------------|
| 12.10 | CGXU - Capital Intl Focus Equity ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | None (or less than \$1,001) | None, | None (or less than \$201) |
| 12.11 | DUHP - Dimensional ETF Trust Dimensional US High Profitab | Mutual Funds Exchange Traded Fund/Note | Spouse | None (or less than \$1,001) | None, | None (or less than \$201) |
| 12.12 | VYM - Vanguard High Dividend Yield ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | None (or less than \$1,001) | None, | None (or less than \$201) |
| 12.13 | VYMI - Vanguard International High Dividend Yield ETF | Mutual Funds Exchange Traded Fund/Note | Spouse | None (or less than \$1,001) | None, | None (or less than \$201) |
| 12.14 | Raymond James Deposit Program (St. Petersburg, FL) <i>Type: Money Market Account,</i> | Bank Deposit | Spouse | None (or less than \$1,001) | None, | None (or less than \$201) |
| 12.15 | AMRFX - American Mutual Fund Class F-2 Shares | Mutual Funds Mutual Fund | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.16 | ICAFX - The Investment Company of America Class F-2 Shs | Mutual Funds Mutual Fund | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.17 | DISVX - Dfa International Small Cap Value Portfolio | Mutual Funds Mutual Fund | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.18 | DBLSX - Doubleline Low Duration Bond Fund Class I | Mutual Funds Mutual Fund | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 12.19 | DFS VX - Dfa U.S. Small Cap Value Portfolio | Mutual Funds Mutual Fund | Spouse | None (or less than \$1,001) | None, | None (or less than \$201) |
| 12.20 | FRSXX - FIMM Treasury Only Port | Mutual Funds Mutual Fund | Spouse | \$1,001 - \$15,000 | None, | None (or less than \$201) |

| Schedule of Investments | | | | | | |
|-------------------------|--|----------------------------|-------|-----------------------|------------|---------------------------|
| 13 | Raymond James Joint Brokerage/Managed Account | Counter | Value | Income Type | Income | |
| 13.1 | AVT - Avnet, Inc. - Common Stock | Corporate Securities Stock | Joint | \$1,001 - \$15,000 | Dividends, | None (or less than \$201) |
| 13.2 | BA - Boeing Company | Corporate Securities Stock | Joint | \$15,001 - \$50,000 | None, | None (or less than \$201) |
| 13.3 | CVX - Chevron Corporation Common Stock | Corporate Securities Stock | Joint | \$15,001 - \$50,000 | Dividends, | \$1,001 - \$2,500 |
| 13.4 | XOM - Exxon Mobil Corporation Common Stock | Corporate Securities Stock | Joint | \$100,001 - \$250,000 | Dividends, | \$5,001 - \$15,000 |
| 13.5 | HAL - Halliburton Company Common Stock | Corporate Securities Stock | Joint | \$1,001 - \$15,000 | Dividends, | \$201 - \$1,000 |
| 13.6 | OXY - Occidental Petroleum Corporation Common Stock | Corporate Securities Stock | Joint | \$1,001 - \$15,000 | Dividends, | None (or less than \$201) |
| 13.7 | PG - Procter & Gamble Company (The) Common Stock | Corporate Securities Stock | Joint | \$15,001 - \$50,000 | Dividends, | \$201 - \$1,000 |
| 13.8 | SLB - Schlumberger N.V. Common Stock | Corporate Securities Stock | Joint | \$1,001 - \$15,000 | Dividends, | \$201 - \$1,000 |
| 13.9 | TMUS - T-Mobile US, Inc. - Common Stock | Corporate Securities Stock | Joint | \$1,001 - \$15,000 | Dividends, | None (or less than \$201) |
| 13.10 | VVI - Viad Corp Common Stock | Corporate Securities Stock | Joint | \$1,001 - \$15,000 | None, | None (or less than \$201) |
| 13.11 | WMB - Williams Companies, Inc. (The) Common Stock | Corporate Securities Stock | Joint | \$1,001 - \$15,000 | Dividends, | None (or less than \$201) |
| 13.12 | TRPXX - Invesco Treasury Portfolio Institutional Class | Mutual Funds Mutual Fund | Joint | \$50,001 - \$100,000 | Dividends, | \$2,501 - \$5,000 |
| 13.13 | Raymond James Deposit Program | Bank Deposit | Joint | \$1,001 | Interest | None |

| | | | | | | |
|-------|---|--------------|-------|--------------------------|-----------------------|---------------------------|
| 13.13 | Raymond James Deposit Program (St. Petersburg, FL) Type: Money Market Account, | Bank Deposit | Joint | \$1,001 - \$15,000 Value | Interest, Income Type | None (or less than \$201) |
| | | | | | | |
| | | | | | | |

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 | 07/29/2024 | Self | BRK.B | Berkshire Hathaway Cl B | Sale (Partial) | \$1,001 - \$15,000 | -- |
| 2 | 07/29/2024 | Self | BRK.B | Berkshire Hathaway Cl B | Sale (Partial) | \$15,001 - \$50,000 | -- |
| 3 | 07/29/2024 | Spouse | BRK.B | Berkshire Hathaway Cl B | Sale (Partial) | \$1,001 - \$15,000 | -- |
| 4 | 07/29/2024 | Spouse | BRK.B | Berkshire Hathaway Cl B | Sale (Partial) | \$1,001 - \$15,000 | -- |
| 5 | 12/16/2024 | Self | BRK.B | Berkshire Hathaway Cl B | Purchase | \$1,001 - \$15,000 | -- |

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 | CGDG | Capital Group Dividend Growers ETF | Purchase | 12/16/2024 | \$15,001 - \$50,000 | n/a |
| 2 | Self | CGDV | Capital Group Dividend Value ETF | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 3 | Self | CGDV | Capital Group Dividend Value ETF | Sale (Partial) | 07/30/2024 | \$1,001 - \$15,000 | n/a |
| 4 | Self | CGXU | Capital Intl Focus Equity ETF | Sale (Full) | 12/16/2024 | \$15,001 - \$50,000 | n/a |
| 5 | Self | DFEV | Dimensional Emerging Markets | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |

| # | Owner | Ticker | Markets Value ETF Asset Name | Transaction Type | Transaction Date | \$15,000 Amount | Comments |
|----|-------|----------------------|---|------------------|------------------|---------------------------|----------|
| 6 | Self | DUHP | Dimensional ETF Trust Dimensional US High Profitab | Sale (Full) | 12/16/2024 | \$15,001 - \$50,000 | n/a |
| 7 | Self | DFSV | Dimensional US Small Cap Value ETF | Purchase | 12/16/2024 | \$15,001 - \$50,000 | n/a |
| 8 | Self | DFIV | Dimensional International Value ETF | Purchase | 12/16/2024 | \$15,001 - \$50,000 | n/a |
| 9 | Self | VYM | Vanguard High Dividend Yield ETF | Sale (Full) | 12/16/2024 | \$15,001 - \$50,000 | n/a |
| 10 | Self | VYMI | Vanguard International High Dividend Yield ETF | Sale (Full) | 12/16/2024 | \$15,001 - \$50,000 | n/a |
| 11 | Self | VYMI | Vanguard International High Dividend Yield ETF | Purchase | 07/30/2024 | \$1,001 - \$15,000 | n/a |
| 12 | Self | VGSH | Vanguard Short-Term Treasury ETF | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 13 | Self | VGSH | Vanguard Short-Term Treasury ETF | Purchase | 07/30/2024 | \$1,001 - \$15,000 | n/a |
| 14 | Self | DXJ | WisdomTree Japan Hedged Equity Fund | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 15 | Self | DXJ | WisdomTree Japan Hedged Equity Fund | Sale (Partial) | 07/30/2024 | \$1,001 - \$15,000 | n/a |
| 16 | Self | CGDG | Capital Group | Purchase | 12/16/2024 | \$1,001 - | n/a |

| # | Owner | Ticker | Dividend Asset Name ETF | Transaction Type | Transaction Date | \$15,000 Amount | Comments |
|----|--------|----------------------|--|---------------------|---------------------|--------------------------|----------|
| 17 | Self | CGDV | Capital Group Dividend Value ETF | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 18 | Self | CGXU | Capital Intl Focus Equity ETF | Sale (Full) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 19 | Self | DUHP | Dimensional ETF Trust Dimensional US High Profitab | Sale (Full) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 20 | Self | DFSV | Dimensional US Small Cap Value ETF | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 21 | Self | DFIV | Dimensional International Value ETF | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 22 | Self | VYM | Vanguard High Dividend Yield ETF | Sale (Full) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 23 | Self | VYMI | Vanguard International High Dividend Yield ETF | Sale (Full) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 24 | Self | DXJ | WisdomTree Japan Hedged Equity Fund | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 25 | Spouse | CGDG | Capital Group Dividend Growers ETF | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 26 | Spouse | CGDV | Capital Group Dividend Value ETF | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 27 | Spouse | CGXU | Capital Intl | Sale (Full) | 12/16/2024 | \$1,001 | n/a |

| # | Owner | Ticker | Focus Equity ETF Asset Name | Transaction Type | Transaction Date | - \$15,000 Amount | Comments |
|----|--------|----------------------|--|---------------------|---------------------|--------------------------|----------|
| 28 | Spouse | DUHP | Dimensional ETF Trust Dimensional US High Profitab | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 29 | Spouse | DFSV | Dimensional ETF Trust Dimensional US Small Cap Val | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 30 | Spouse | DFIV | Dimensional International Value ETF | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 31 | Spouse | VYM | Vanguard High Dividend Yield ETF | Sale (Full) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 32 | Spouse | VYMI | Vanguard International High Dividend Yield ETF | Sale (Full) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 33 | Spouse | VGSH | Vanguard Short-Term Treasury ETF | Purchase | 07/30/2024 | \$1,001 - \$15,000 | n/a |
| 34 | Spouse | DXJ | WisdomTree Japan Hedged Equity Fund | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 35 | Spouse | CGDG | Capital Group Dividend Growers ETF | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 36 | Spouse | CGDV | Capital Group Dividend Value ETF | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 37 | Spouse | CGXU | Capital Intl Focus Equity ETF | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 38 | Spouse | DUHP | Dimensional | Sale | 12/16/2024 | \$1,001 | n/a |

| # | Owner | Ticker | ETF Trust Dimensional Asset Name US High | (Partial) Transaction Type | Transaction Date | - \$15,000 Amount | Comments |
|----------|--------|-----------------------|--|----------------------------------|---------------------|---------------------------|----------|
| Profitab | | | | | | | |
| 39 | Spouse | DFSV | Dimensional US Small Cap Value ETF | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 40 | Spouse | DFIV | Dimensional International Value ETF | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 41 | Spouse | VYM | Vanguard High Dividend Yield ETF | Sale (Full) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 42 | Spouse | VYMI | Vanguard International High Dividend Yield ETF | Sale (Full) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 43 | Self | AMRFX | American Mutual Fund Class F-2 Shares | Purchase | 12/16/2024 | \$15,001 - \$50,000 | n/a |
| 44 | Self | ICAFX | The Investment Company of America Class F-2 Shs | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 45 | Self | ICAFX | The Investment Company of America Class F-2 Shs | Sale (Partial) | 07/29/2024 | \$1,001 - \$15,000 | n/a |
| 46 | Self | DISVX | Dfa International Small Cap Value Portfolio | Purchase | 12/16/2024 | \$15,001 - \$50,000 | n/a |
| 47 | Self | DFSVX | Dfa U.S. Small Cap Value Portfolio | Sale (Full) | 12/16/2024 | \$15,001 - \$50,000 | n/a |
| 48 | Self | DBLSX | Doubleline Low | Purchase | 07/29/2024 | \$1,001 - | n/a |

| # | Owner | Ticker | Low Duration Bond Fund Class I | Transaction Type | Transaction Date | \$15,000 Amount | Comments |
|----|--------|------------------------|--|---------------------|---------------------|--------------------------|----------|
| 49 | Self | DBLSX | Doubleline Low Duration Bond Fund Class I | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 50 | Self | AMRFX | American Mutual Fund Class F-2 Shares | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 51 | Self | ICAFX | The Investment Company of America Class F-2 Shs | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 52 | Self | DISVX | Dfa International Small Cap Value Portfolio | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 53 | Self | DFS VX | Dfa U.S. Small Cap Value Portfolio | Sale (Full) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 54 | Self | DBLSX | Doubleline Low Duration Bond Fund Class I | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 55 | Spouse | AMRFX | American Mutual Fund Class F-2 Shares | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 56 | Spouse | ICAFX | The Investment Company of America Class F-2 Shs | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 57 | Spouse | DISVX | Dfa International Small Cap Value Portfolio | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |

| 58 # | Spouse Owner | DFSVM Ticker | Dfa U.S. Asset Name Small Cap | Transaction Sale (Full) Type | Transaction 12/16/2024 Date | \$1,001 Amount - | n/a Comments |
|---------|-----------------|---------------------------------|--|------------------------------------|-----------------------------------|--------------------------|-----------------|
| | | | Value Portfolio | | | \$15,000 | |
| 59 | Spouse | DBLSX | Doubleline Low Duration Bond Fund Class I | Purchase | 07/29/2024 | \$1,001 - \$15,000 | n/a |
| 60 | Spouse | DBLSX | Doubleline Low Duration Bond Fund Class I | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 61 | Spouse | AMRFX | American Mutual Fund Class F-2 Shares | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 62 | Spouse | ICAFX | The Investment Company of America Class F-2 Shs | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 63 | Spouse | DISVM | Dfa International Small Cap Value Portfolio | Purchase | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 64 | Spouse | DFSVM | Dfa U.S. Small Cap Value Portfolio | Sale (Full) | 12/16/2024 | \$1,001 - \$15,000 | n/a |
| 65 | Spouse | DBLSX | Doubleline Low Duration Bond Fund Class I | Sale (Partial) | 12/16/2024 | \$1,001 - \$15,000 | n/a |

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 1987 to present | Trustee | Fort Hays State University Foundation Hays, KS | Nonprofit Organization | Non-profit fundraising arm of a state university. |
| 2 | Jan 1990 to present | Other (Governor) | University of Kansas School of Law, Board of Governors Lawrence, KS | Educational Organization | 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.

