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Annual Report for Calendar 2024

The Honorable James Banks (Banks, James E.)

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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	Family Policy Alliance Foundation Colorado Springs, CO	> \$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	Grace Schools IRA	Retirement Plan	Spouse			

	Asset	Retirement Plans IRA Asset Type	Spouse Owner	Value	Income Type	Income
1.1	Grace Schools IRA - Money Market <i>Company: Grace Schools (Winona Lake, IN) Description: Cash Filer comment: IRA held in cash</i>	Deferred Compensation Deferred Compensation - Cash	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
2	ReliaStar Life Insurance <i>Provider: ReliaStar Life Insurance Company</i>	Life Insurance Universal	Spouse	\$100,001 - \$250,000	None,	None (or less than \$201)
3	Roblox Corporation Class A (RBLX)	Corporate Securities Stock	Joint	None (or less than \$1,001)	None,	None (or less than \$201)
4	Peloton Interactive, Inc. (PTON)	Corporate Securities Stock	Joint	\$1,001 - \$15,000	Interest,	None (or less than \$201)
5	Schwab IRA	Retirement Plans IRA	Self			
5.1	PTON - Peloton Interactive, Inc. - Common Stock <i>Filer comment: Tax-deferred</i>	Corporate Securities Stock	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
5.2	Patient Access Solutions Inc. (PASO) <i>Filer comment: Tax-deferred</i>	Corporate Securities Stock	Self	None (or less than \$1,001)	None,	None (or less than \$201)
6	Roth IRA	Retirement Plans IRA	Spouse			
6.1	MOAT - VanEck Morningstar Wide Moat ETF <i>Filer comment: Tax-deferred</i>	Mutual Funds Exchange Traded Fund/Note	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
7	MOAT - VanEck Vectors Morningstar Wide Moat ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
8	IRA	Retirement Plans IRA	Spouse			
8.1	MOAT - VanEck Morningstar Wide Moat ETF <i>Filer comment: Tax-Deferred</i>	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	None,	None (or less than \$201)

9	Indiana Deferred Compensation Account <i>Filer comment: Tax-deferred</i>	Retirement Plans Deferred Compensation	Self	\$1,001 - \$15,000	None	None (or less than \$201)
10	State of Indiana Public Employee Deferred Compensation Plan <i>Filer comment: Tax-deferred</i>	Retirement Plans Deferred Compensation	Spouse	None (or less than \$1,001)	None,	None (or less than \$201)
11	INPRS Legislators' Defined Contribution Fund	Retirement Plans Defined Contribution Pension Plan	Self			
11.1	2045 Retirement Fund <i>Filer comment: Tax-deferred, 2045 Retirement Fund</i>	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	None,	None (or less than \$201)
12	INPRS Legislators' Defined Contribution Fund	Retirement Plans Defined Contribution Pension Plan	Spouse			
12.1	2045 Retirement Fund <i>Filer comment: Tax-deferred, 2045 Retirement Fund</i>	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
13	Rental property <i>Description: Rental property in Falls Church (Falls Church, VA)</i>	Real Estate Residential	Joint	\$1,000,001 - \$5,000,000	Rent/Royalties,	\$15,001 - \$50,000
14	YUM - Yum! Brands, Inc.	Corporate Securities Stock	Joint	\$1,001 - \$15,000	None,	None (or less than \$201)
15	College Choice 529 <i>Institution: INDIANA 529</i> <i>Filer comment: Tax-deferred, 529 plan for child 3</i>	Education Savings Plans 529 College Savings Plan	Joint			
15.1	2033 Enrollment Portfolio	Mutual Funds Mutual Fund	Joint	\$1,001 - \$15,000	None,	None (or less than \$201)
16	College Choice 529 <i>Institution: INDIANA 529</i> <i>Filer comment: Tax-deferred, 529 plan for child 2</i>	Education Savings Plans 529 College Savings Plan	Joint			
16.1	2030 Enrollment Portfolio	Mutual Funds Mutual Fund	Joint	\$1,001 - \$15,000	None,	None (or less

Asset	Asset Type	Owner	Value	Income Type	(or less than \$201)
17 College Choice 529 <i>Institution:</i> INDIANA 529 <i>Filer comment:</i> Tax-deferred, 529 plan for child 1	Education Savings Plans 529 College Savings Plan	Joint			
17.1 2030 Enrollment Portfolio	Mutual Funds Mutual Fund	Joint	\$1,001 - \$15,000	None,	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.

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	YUM	Yum! Brands, Inc.	Purchase	08/08/2024	\$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? **Yes**

#	Incurred	Debtor	Type	Points	Rate (Term)	Amount	Creditor	Comments
1	2020	Joint	Mortgage	0	2.875% (30 years)	\$500,001 - \$1,000,000	Dovenmuehle Lake Zurich, IL	n/a
2	2024	Joint	Mortgage	0	6.293% (30 years)	\$250,001 - \$500,000	Newrez Fort Washington, PA	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? **Yes**

#	Date	Parties Involved	Type	Status and Terms	Comments
1	Nov 2017	INPRS - Indiana Public Retirement System Indianapolis, IN	Continuing participation in an employee benefit plan	Continued participation in retirement account	n/a

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? **No**

Attachments & Comments

No attachments added.

No comments added.

