


United States Senate

Financial Disclosures

Annual Report for Calendar 2024

The Honorable John N Kennedy (Kennedy, John)

 Filed 08/13/2025 @ 12:50 PM

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	Self	Retirement	Charles Schwab Keogh Retirement Plan Westlake, TX	\$771.75	n/a
2	Self	Retirement	Charles Schwab Keogh Retirement Plan Westlake, TX	\$1,902.93	n/a
3	Self	Retirement	Charles Schwab IRA Rollover Westlake, TX	\$5,230.32	n/a
4	Self	Retirement	Charles Schwab IRA Rollover Westlake, TX	\$2,513.95	n/a
5	Self	Retirement	Fidelity IRA Boston, MA	\$3,898.09	n/a
6	Self	Royalties (Book Advance)	HarperCollins Publishing LLC New York, NY	\$60,000.00	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	First Louisiana Investment Properties LLC - JK has 1/3 interest <i>Company:</i> First Louisiana Investment Properties LLC (Madisonville, Louisiana) <i>Description:</i> Investment Company	Business Entity Limited Liability Company (LLC)	Self			
1.1	ILCB - Mstar Large-Cap Ishares ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$1,001 - \$2,500
1.2	Chase Bank (Baton Rouge, Louisiana) <i>Type:</i> Checking,	Bank Deposit	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.3	5005 Main St <i>Description:</i> 5005 Main Street (Zachary, Louisiana) <i>Filer comment:</i> Commercial office space; this is gross rent (John Kennedy share)	Real Estate Commercial	Self	\$100,001 - \$250,000	Rent/Royalties,	\$2,501 - \$5,000
1.4	4312 Marshall Street <i>Description:</i> 4312 Marshall Street (Zachary, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.5	IVV - iShares Core S&P 500 ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
1.6	VOO - S&P 500 ETF Vanguard	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Dividends,	\$201 - \$1,000
1.7	5037 Main St. <i>Description:</i> 5037 Main Street (Zachary, Louisiana) <i>Filer comment:</i> Commercial office space; this represents gross (John Kennedy share)	Real Estate Commercial	Self	\$100,001 - \$250,000	Rent/Royalties,	\$5,001 - \$15,000
1.8	3150 Church Street, Zachary, LA 70791 <i>Description:</i> 3150 Church Street (Zachary, Louisiana)	Real Estate Commercial	Self	\$250,001 - \$500,000	Rent/Royalties,	\$5,001 - \$15,000

	Asset	Asset Type	Owner	Value	Income Type	Income
1.9	1520 Main Street, Baker LA <i>Description:</i> 1520 Main Street, Baker, LA (Baker, LA)	Real Estate Commercial	Self	\$50,001 - \$100,000	Rent/Royalties,	\$1,001 - \$2,500
1.10	102 acres, Church Street <i>Description:</i> 102 acres, Zachary, LA (Zachary, LA) <i>Filer comment:</i> Rent for cattle-raising, Gross rent (John Kennedy share)	Real Estate Unimproved Land	Self	\$1,000,001 - \$5,000,000	Rent/Royalties,	\$201 - \$1,000
1.11	Lot A, Zachary Heights, Zachary, LA <i>Description:</i> Lot A, Zachary Heights, Zachary, LA (Zachary, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.12	Lot 3, 38th St. Zachary, LA <i>Description:</i> Lot 3, 38th St. Zachary, LA (Zachary, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.13	Lot 4, 38th St. Zachary, LA <i>Description:</i> Lot 4, 38th St. Zachary, LA (Zachary, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.14	Lot 2, Creech sub., Old Weis Rd., Zachary, LA <i>Description:</i> Lot 2, Creech sub., Old Weis Rd., Zachary, LA (Zachary, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.15	Lot 3, Creech sub., Old Weis Rd., Zachary, LA <i>Description:</i> Lot 3, Creech sub., Old Weis Rd., Zachary, LA (Zachary, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.16	Lot 4, Creech sub., Old Weis Rd., Zachary, LA <i>Description:</i> Lot 4, Creech sub., Old Weis Rd., Zachary, LA (Zachary, LA) <i>Filer comment:</i> This asset was transferred to First Louisiana Investment Properties in 2021. This was a non-taxable event.	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
1.17	Lot 5, Creech sub., Old Weis Rd., Zachary, LA <i>Description:</i> Lot 5, Creech sub., Old Weis Rd., Zachary, LA (Zachary, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.18	Lot 6, Creech sub., Old Weis Rd., Zachary, LA <i>Description:</i> Lot 6, Creech sub., Old Weis Rd., Zachary, LA (Zachary, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.19	Lot 42, Meadowood Hills Sub., Slaughter, LA <i>Description:</i> Lot 42, Meadowood Hills Sub., Slaughter, LA (Zachary, LA)	Real Estate Unimproved Land	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
1.20	Lot 43, Meadowood Hills Sub., Slaughter, LA <i>Description:</i> Lot 43, Meadowood Hills Sub., Slaughter, LA (Slaughter, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.21	Lot 50, Meadowood Hills Sub., Slaughter, LA <i>Description:</i> Lot 50, Meadowood Hills Sub., Slaughter, LA (Slaughter, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.22	Lot 115, Meadowood Hills Sub., Slaughter, LA <i>Description:</i> Lot 115, Meadowood Hills Sub., Slaughter, LA (Slaughter, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.23	6 acres, Slaughter, LA <i>Description:</i> 6 acres, Slaughter, LA (Slaughter, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
1.24	Lot 133, Zachary Heights, Zachary LA <i>Description:</i> Lot 133 Zachary Heights, Zachary LA (Zachary, LA)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
1.25	<u>MRK</u> - Merck & Co	Corporate Securities Stock	Self	None (or less than \$1,001)	Dividends,	None (or less than \$201)
2	Capital One Bank (Baton Rouge, Louisiana) <i>Type: Checking,</i>	Bank Deposit	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
3	Capital One Bank (Baton Rouge, Louisiana) <i>Type: Checking,</i>	Bank Deposit	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
4	Mineral royalty interest, Livingston Parish, LA <i>Description: Mineral royalty interest (Livingston Parish, Louisiana)</i>	Real Estate Mineral Rights	Self	\$1,001 - \$15,000	Rent/Royalties,	None (or less than \$201)
5	APK Minerals LLC - JK has 1/3 interest <i>Company: APK Minerals LLC (Olympia, Washington) Description: LLC</i>	Business Entity Limited Liability Company (LLC)	Self			
5.1	Minerals, Wilkinson & Amite County, MS <i>Description: Minerals (Wilkinson, Amite County, Mississippi)</i>	Real Estate Mineral Rights	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
6	Louisiana Public Employees Deferred Compensation Plan	Retirement Plans 401(k), 403(b), or other Defined Contribution Plan.	Self			
6.1	Charles Schwab PCRA Brokerage Account	Brokerage/Managed Account	Self			
6.1.1	<u>QQQ</u> - Invesco QQQ Trust, Series 1	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$1,001 - \$2,500
6.1.2	<u>IVV</u> - iShares Core S&P 500	Mutual Funds Exchange Traded Fund/Note	Self	\$500,001 - \$1,000,000	Dividends,	\$5,001 - \$15,000
6.1.3	<u>SCHE</u> - Schwab Intl Equity ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	Dividends,	\$201 - \$1,000

	Asset	Asset Type	Owner	Value	Income Type	Income
6.2	BKTSX - Ishares Total U.S. Stock Market Index Fund - Cla	Mutual Funds Mutual Fund	Self	\$1,000,001 - \$5,000,000	None,	None (or less than \$201)
7	Charles Schwab IRA	Retirement Plans IRA	Self			
7.1	ILCB - Mstar Large-Cap Ishares ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$1,001 - \$2,500
8	Charles Schwab Keogh Plan	Retirement Plans 401(k), 403(b), or other Defined Contribution Plan.	Self			
8.1	SCHF-Schwab Strategic Trust - Schwab International Equity ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
8.2	IVV-iShares Core S&P 500	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
8.3	VTI-Vanguard Total Stock Market ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
8.4	QQQ - Invesco QQQ Trust, Series 1	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
9	Charles Schwab Keogh Plan	Retirement Plans 401(k), 403(b), or other Defined Contribution Plan.	Self			
9.1	RWJ - Smallcap Revenue ETF Oppenheimer	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
10	Charles Schwab IRA	Retirement Plans IRA	Spouse			
10.1	ILCB - Mstar Large-Cap Ishares ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500

	Asset	Asset Type	Owner	Value	Income Type	Income
10.2	<u>USMV</u> - iShares MSCI USA Min Vol Factor ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$100,001 - \$250,000	Dividends,	\$2,501 - \$5,000
10.3	<u>QQQ</u> - Nasdaq QQQ Invesco ETF	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
11	Charles Schwab Brokerage Account	Brokerage/Managed Account	Spouse			
11.1	<u>ILCB</u> - Mstar Large-Cap Ishares ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
11.2	<u>IVV</u>-iShares Trust - iShares S&P 500 ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$100,001 - \$250,000	Dividends,	\$1,001 - \$2,500
11.3	<u>IP</u> - International Paper Company	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
11.4	<u>RPG</u>-Rydex ETF Trust - Guggenheim S&P 500 Pure Growth ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$100,001 - \$250,000	Dividends,	\$201 - \$1,000
11.5	<u>XOM</u> - Exxon Mobil Corporation	Corporate Securities Stock	Spouse	\$15,001 - \$50,000	Dividends,	\$1,001 - \$2,500
11.6	<u>HWM</u> - Howmet Aerospace Inc. Common Stock	Corporate Securities Stock	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
11.7	<u>RSPH</u> - S&P 500 EW Health Care Invesco ETF	Mutual Funds Exchange Traded Fund/Note	Spouse	\$50,001 - \$100,000	Dividends,	\$201 - \$1,000
11.8	<u>SWVXX</u> Schwab Value Advantage Money Inv	Mutual Funds Mutual Fund	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
12	Charles Schwab Brokerage Account	Brokerage/Managed Account	Self			
12.1	<u>PRU</u> - Prudential Financial, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
12.2	JNPR - Juniper Networks, Inc.	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
12.3	JPM - JPMorgan Chase & Co.	Corporate Securities Stock	Self	\$100,001 - \$250,000	Dividends,	\$1,001 - \$2,500
12.4	ILCB - Mstar Large-Cap Ishares ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$2,501 - \$5,000
12.5	SNX - Synnex Corporation Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	Dividends,	None (or less than \$201)
12.6	Schwab Bank (San Francisco, CA) Type: Brokerage Sweep Account,	Bank Deposit	Self	\$1,001 - \$15,000	Interest,	None (or less than \$201)
12.7	CNXC - Concentrix Corporation - Common Stock	Corporate Securities Stock	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
12.8	SWVXX Schwab Value Advantage Money Inv	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
12.9	QQQ - Nasdaq QQQ Invesco ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
12.10	VTI - Total Stock Market ETF Vanguard	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
12.11	MUTHX - Mutual Shares Corporation CI Z [Series of Frank	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
13	Charles Schwab Brokerage Account	Brokerage/Managed Account	Self			
13.1	ILCB - Mstar Large-Cap Ishares ETF	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Dividends,	\$2,501 - \$5,000
13.2	WAEMX - Wasatch Emerging Markets Small Cap Fund	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
13.3	SVWXX Schwab Value Advantage Money Inv	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	None,	None (or less than \$201)

	Asset	Asset Type	Owner	Value	Income Type	Income
14	Charles Schwab Brokerage Account	Brokerage/Managed Account	Self			
14.1	QQQ - PowerShares QQQ Trust, Series 1	Mutual Funds Exchange Traded Fund/Note	Self	\$500,001 - \$1,000,000	Dividends,	\$2,501 - \$5,000
14.2	ILCB - Mstar Large-Cap Ishares ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$250,001 - \$500,000	Dividends,	\$5,001 - \$15,000
14.3	MTUM-iShares Edge MSCI USA Momentum Fctr ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$250,001 - \$500,000	Dividends,	\$5,001 - \$15,000
14.4	VOO - Vanguard S&P 500 ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$250,001 - \$500,000	Dividends,	\$2,501 - \$5,000
14.5	RWJ - Smallcap Revenue ETF Oppenheimer	Mutual Funds Exchange Traded Fund/Note	Self	None (or less than \$1,001)	Capital Gains,	\$5,001 - \$15,000
14.6	Charles Schwab Bank (San Francisco, CA) <i>Type: Brokerage Sweep Account,</i>	Bank Deposit	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
14.7	SWVXX - Schwab Value Advantage Money Fund	Mutual Funds Mutual Fund	Self	\$250,001 - \$500,000	Dividends, Capital Gains,	\$5,001 - \$15,000
14.8	FFRHX - Fidelity Floating Rate High Income	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
14.9	SMIN - Ishares MSCI India Small Cap ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$1,001 - \$2,500
14.10	NEAGX - Needham Aggressive Growth Fund - Retail Class	Mutual Funds Mutual Fund	Self	\$100,001 - \$250,000	Dividends,	\$201 - \$1,000
15	Greenwave Property LLC - 1/3 interest <i>Company: Greenwave Property LLC (Madisonville, Louisiana) Description: LLC Filer comment: Real estate holding company; this represents gross income (wife's share)</i>	Business Entity Limited Liability Company (LLC)	Spouse			

	Asset	Asset Type	Owner	Value	Income Type	Income
15.1	89 Fort Panic Road, Santa Rosa Beach, Florida 32459 <i>Description:</i> 89 Fort Panic Road (Santa Rosa Beach, Florida) <i>Filer comment:</i> Rental house; this represents gross rent (wife's share)	Real Estate Residential	Spouse	\$500,001 - \$1,000,000	Rent/Royalties,	\$15,001 - \$50,000
15.2	Chase Bank (Baton Rouge, Louisiana) <i>Type:</i> Checking,	Bank Deposit	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
16	Tchoupitoulas Property LLC - 1/2 interest <i>Company:</i> Tchoupitoulas Property LLC (Metairie, LA) <i>Description:</i> LLC <i>Filer comment:</i> Real estate holding company; this represents gross income (wife's share)	Business Entity Limited Liability Company (LLC)	Spouse			
16.1	3983 Tchoupitoulas St. <i>Description:</i> 3983 Tchoupitoulas St. (New Orleans, Louisiana) <i>Filer comment:</i> Commercial office/business space; gross rent (wife's share)	Real Estate Commercial	Spouse	\$50,001 - \$100,000	Rent/Royalties,	\$5,001 - \$15,000
16.2	Capital One (Baton Rouge, Louisiana) <i>Type:</i> Checking,	Bank Deposit	Spouse	\$1,001 - \$15,000	None,	None (or less than \$201)
17	A.P. Kennedy Family Securities LLC - JK has 1/3 interest <i>Company:</i> A.P. Kennedy Family Securities LLC (Madisonville, LA) <i>Description:</i> LLC <i>Filer comment:</i> Investment company/LLC	Business Entity Limited Liability Company (LLC)	Self			
17.1	IJH - iShares Trust - iShares S&P Mid-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
17.2	IVV-iShares Trust - iShares S&P 500 ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$500,001 - \$1,000,000	Dividends,	\$5,001 - \$15,000

	Asset	Asset Type	Owner	Value	Income Type	Income
17.3	QQQ - PowerShares QQQ Trust, Series 1	Mutual Funds Exchange Traded Fund/Note	Self	\$500,001 - \$1,000,000	Dividends,	\$2,501 - \$5,000
17.4	RSPH - S&P 500 EW Health Care Invesco ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$1,001 - \$2,500
17.5	SPLV - PowerShares S&P Low Volatility Portfolio	Mutual Funds Exchange Traded Fund/Note	Self	\$250,001 - \$500,000	Dividends,	\$2,501 - \$5,000
17.6	Cantex Pharmaceuticals Inc.	Corporate Securities Stock	Self	\$100,001 - \$250,000	Dividends,	\$15,001 - \$50,000
17.7	VTI-Vanguard Total Stock Market ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$1,001 - \$2,500
17.8	VT-Vanguard Total World Stock ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
17.9	ITB-iShares US Home Construction ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$201 - \$1,000
18	Charles Schwab	Brokerage/Managed Account	Self			
18.1	IJH - iShares Trust - iShares S&P Mid-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$2,501 - \$5,000
18.1	IJR-iShares Trust - iShares S&P Small-Cap ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$5,001 - \$15,000
18.1	VEA-Vanguard Tax-Managed Funds - Vanguard FTSE Developed Markets ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$5,001 - \$15,000
18.2	VWO - Vanguard FTSE Emerging Markets Index Funds ETF	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Dividends,	\$5,001 - \$15,000
18.3	IVV - iShares Core S&P 500	Mutual Funds Exchange Traded Fund/Note	Self	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000

	Asset	Asset Type	Owner	Value	Income Type	Income
18.4	QQQ - Invesco QQQ Trust, Series 1	Mutual Funds Mutual Fund	Self	\$500,001 - \$1,000,000	Dividends,	\$2,501 - \$5,000
19	Undiv. 1/3 int., 4140 Hwy. 19, Zachary, LA <i>Description:</i> Undiv. 1/3 int., 4140 Hwy. 19, Zachary, LA (Zachary, LA) <i>Filer comment:</i> Commercial office/business space; gross rent (John Kennedy share)	Real Estate Commercial	Self	\$100,001 - \$250,000	Rent/Royalties,	\$2,501 - \$5,000
20	Undiv. 1/2 interest, 26 Del Oaks, Madisonville, LA <i>Description:</i> 26 Del Oaks, Madisonville, LA (Madisonville, LA) <i>Filer comment:</i> This is the Kennedy personal residence	Real Estate Residential	Self	\$100,001 - \$250,000	None,	None (or less than \$201)
21	Undiv. 1/3 interest, 132 acres, Greensburg, LA <i>Description:</i> Undiv. 1/3 interest, 132 acres, Greensburg, LA (Greensburg, LA) <i>Filer comment:</i> Rent from a hunting lease; gross rent (John Kennedy share)	Real Estate Unimproved Land	Self	\$100,001 - \$250,000	Rent/Royalties,	\$201 - \$1,000
22	Undiv. 1/2 interest, 65 acres, Greensburg, LA <i>Description:</i> Undiv. 1/2 interest, 65 acres, Greensburg, LA (Greensburg, LA) <i>Filer comment:</i> Rent from a hunting lease; gross rent (John Kennedy share)	Real Estate Unimproved Land	Self	\$100,001 - \$250,000	Rent/Royalties,	\$201 - \$1,000
23	Undiv. 1/3 interest, 60 acres, Pine Grove, LA <i>Description:</i> Undiv. 1/3 interest, 60 acres, Pine Grove, LA (Pine Grove, LA) <i>Filer comment:</i> Rent from hunting lease; gross rent (John Kennedy share)	Real Estate Unimproved Land	Self	\$50,001 - \$100,000	Rent/Royalties,	\$201 - \$1,000

	Asset	Asset Type	Owner	Value	Income Type	Income
24	Undiv. 1/3 int., 57 acres, Centreville, MS <i>Description:</i> Undiv. 1/3 int., 57 acres, Centreville, MS (Centreville, MS)	Real Estate Unimproved Land	Self	\$50,001 - \$100,000	None,	None (or less than \$201)
25	Undiv. 1/3 int., lot, Centreville, MS <i>Description:</i> Undiv. 1/3 int., lot, Centreville, MS (Centreville, MS)	Real Estate Unimproved Land	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
26	Undiv. 29.3% int., Lots 12 & 13, Main Street, Zachary, LA <i>Description:</i> Undiv. 29.3% int., Main Street, Zachary, LA (Zachary, LA)	Real Estate Unimproved Land	Self	\$100,001 - \$250,000	None,	None (or less than \$201)
27	Charles Schwab IRA	Retirement Plans IRA	Self			
27.1	QQQ - Invesco QQQ Trust, Series 1	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Dividends,	\$201 - \$1,000
28	John Neely Kennedy, APLC <i>Company:</i> John Neely Kennedy, APLC (Madisonville, LA) <i>Description:</i> John Neely Kennedy, APLC <i>Filer comment:</i> A professional law corporation; legal fees	Corporate Securities Non-Public Stock	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
29	Allied Builders Supply, Inc. <i>Company:</i> Allied Builders Supply, Inc. (Madisonville, LA) <i>Description:</i> Allied Builders Supply, Inc. <i>Filer comment:</i> Investment holding company. Has no income; 1/3 interest	Corporate Securities Non-Public Stock	Self	None (or less than \$1,001)	None,	None (or less than \$201)
30	Fidelity IRA	Retirement Plans IRA	Self			
30.1	QQQ-Invesco QQQ Trust	Mutual Funds Exchange Traded Fund/Note	Self	\$100,001 - \$250,000	Dividends,	\$201 - \$1,000

	Asset	Asset Type	Owner	Value	Income Type	Income
31	The Presken Corporation <i>Company:</i> The Presken Corporation (Madisonville, LA) <i>Description:</i> Investment Holding Company <i>Filer comment:</i> 1/3 interest	Corporate Securities Non-Public Stock	Self	\$1,001 - \$15,000	Dividends,	\$2,501 - \$5,000
32	ILCB - Mstar Large-Cap Ishares ETF <i>Filer comment:</i> Underlying asset of Presken Corporation; 1/3 interest.	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
33	North Parish Development Corporation <i>Company:</i> North Parish Development Corporation (Madisonville, LA) <i>Description:</i> North Parish Development Corporation <i>Filer comment:</i> Investment holding company/LLC; 1/3 interest	Corporate Securities Non-Public Stock	Joint	\$100,001 - \$250,000	Dividends, Rent/Royalties,	\$5,001 - \$15,000
34	ILCB - Mstar Large-Cap Ishares ETF <i>Filer comment:</i> Underlying asset of North Parish Development Corporation; 1/3 interest.	Mutual Funds Exchange Traded Fund/Note	Self	\$50,001 - \$100,000	Dividends,	\$1,001 - \$2,500
35	TBLIX - Transamerica Multi-Mgd Balanced I <i>Filer comment:</i> Underlying asset of North Parish Development Corporation; 1/3 interest	Mutual Funds Mutual Fund	Self	\$15,001 - \$50,000	Dividends,	\$201 - \$1,000
36	VTWG - Vanguard Russell 2000 Growth ETF <i>Filer comment:</i> Underlying asset of North Parish Development Corporation; 1/3 interest	Mutual Funds Mutual Fund	Self	\$50,001 - \$100,000	Dividends,	\$201 - \$1,000

	Asset	Asset Type	Owner	Value	Income Type	Income
37	The Oxvirvand Corporation <i>Company:</i> The Oxvirvand Corporation (Madisonville, LA) <i>Description:</i> The Oxvirvand Corporation <i>Filer comment:</i> Investment holding company; royalties and rent	Corporate Securities Non-Public Stock	Self	\$15,001 - \$50,000	Rent/Royalties,	\$1,001 - \$2,500
38	9 acres unimproved land, Greensburg, La <i>Description:</i> 9 acres unimproved land (Greensburg, La) <i>Filer comment:</i> Underlying asset of The Oxvirvand Corporation	Real Estate Unimproved Land	Self	\$15,001 - \$50,000	None,	None (or less than \$201)
39	Mineral interest, Livingston Parish, La <i>Description:</i> Mineral interest (Livingston, La) <i>Filer comment:</i> Underlying asset of The Oxvirvand Corporation	Real Estate Mineral Rights	Self	\$1,001 - \$15,000	Rent/Royalties,	\$201 - \$1,000
40	QQQ - Invesco QQQ Trust, Series 1	Mutual Funds Mutual Fund	Self	\$1,001 - \$15,000	None,	None (or less than \$201)
41	Undiv. 1/3 int., lot, Centreville, MS <i>Description:</i> Undiv. 1/3 int., lot, Centreville, MS (Centreville, MS)	Real Estate Unimproved Land	Self	\$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	Self	<u>MRGKX</u>	MFS Core Equity Fund Class R6	Sale (Full)	08/19/2024	\$500,001 - \$1,000,000	n/a
2	Self	--	Ishares Total U.S. Stock Market Index Fund - BKSTX	Purchase	08/19/2024	\$500,001 - \$1,000,000	n/a
3	Self	<u>SMIN</u>	India Smallcap Ishares MSCI ETF	Purchase	01/23/2024	\$50,001 - \$100,000	n/a
4	Self	<u>ILCB</u>	Mstar Largecap Ishares ETF	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
5	Self	<u>SMIN</u>	India Smallcap Ishares MSCI ETF	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
6	Self	<u>MTUM</u>	MTUM	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
7	Self	<u>VOO</u>	S&P 500 ETF Vanguard	Purchase	12/26/2024	\$1,001 - \$15,000	n/a
8	Self	<u>IVV</u>	iShares Core S&P 500	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
9	Self	<u>IJR</u>	S&P Smallcap Ishares Core ETF	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
10	Self	<u>VEA</u>	Vanguard FTSE Developed Markets ETF	Purchase	12/24/2024	\$1,001 - \$15,000	n/a
11	Self	<u>VWO</u>	Vanguard FTSE Emerging Markets ETF	Purchase	12/26/2024	\$1,001 - \$15,000	n/a
12	Self	<u>IVV</u>	iShares Core S&P 500	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
13	Spouse	<u>USMV</u>	iShares MSCI USA Min Vol Factor ETF	Purchase	12/20/2024	\$1,001 - \$15,000	n/a
14	Self	<u>TBLIX</u>	Transamerica Multi-Managed Balanced Class I	Purchase	12/23/2024	\$1,001 - \$15,000	n/a
15	Self	<u>RWJ</u>	Invesco Exchange-Traded Fund Trust II Invesco S&P	Sale (Full)	02/26/2024	\$100,001 - \$250,000	n/a

#	Owner	Ticker	Asset Name	Transaction Type	Transaction Date	Amount	Comments
16	Self	<u>NEAGX</u>	Needham Aggressive Growth Fund - Retail Class	Purchase	02/22/2024	\$100,001 - \$250,000	n/a
17	Self	<u>ILCB</u>	iShares Morningstar Large-Cap ETF	Purchase	06/17/2024	\$1,001 - \$15,000	n/a
18	Self	<u>ILCB</u>	Mstar Largecap Ishares ETF	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
19	Self	<u>VOO</u>	Vanguard S&P 500 ETF	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
20	Self	<u>ILCB</u>	iShares Morningstar Large-Cap ETF	Purchase	09/30/2024	\$1,001 - \$15,000	n/a
21	Self	<u>IVV</u>	iShares Core S&P 500	Purchase	06/17/2024	\$1,001 - \$15,000	n/a
22	Spouse	<u>USMV</u>	iShares MSCI USA Min Vol Factor ETF	Purchase	09/30/2024	\$1,001 - \$15,000	n/a
23	Self	<u>IVV</u>	iShares Core S&P 500	Purchase	09/30/2024	\$1,001 - \$15,000	n/a
24	Self	<u>IVV</u>	iShares Core S&P 500 ETF	Purchase	09/30/2024	\$1,001 - \$15,000	n/a
25	Self	<u>IVV</u>	iShares Core S&P 500 ETF	Purchase	03/27/2024	\$1,001 - \$15,000	n/a
26	Self	<u>IVV</u>	iShares Core S&P 500	Purchase	06/17/2024	\$1,001 - \$15,000	n/a
27	Self	<u>IVV</u>	iShares Core S&P 500	Purchase	03/28/2024	\$1,001 - \$15,000	n/a
28	Self	<u>VEA</u>	Vanguard FTSE Developed Markets ETF	Purchase	06/25/2024	\$1,001 - \$15,000	n/a
29	Self	<u>QQQ</u>	Invesco QQQ Trust, Series 1	Sale (Partial)	11/27/2024	\$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	2011	Joint	Mortgage		3.375% (15 years)	\$100,001 - \$250,000	Wells Fargo San Francisco, California	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 1993 to present	Other (President)	John Neely Kennedy APLC Madisonville, Louisiana	Corporation	n/a
2	Jan 1983 to present	Other (Member)	First Louisiana Investment Properties, LLC Madisonville, Louisiana	Corporation	n/a
3	Jan 1984 to present	Other (President)	The Oxvirvand Corporation Madisonville, Louisiana	Corporation	n/a
4	Jan 1985 to present	Other (President)	The Presken Corporation Madisonville, Louisiana	Corporation	n/a
5	Jan 1998 to present	Other (Vice-President)	North Parish Development Corporation Madisonville, Louisiana	Corporation	n/a
6	Jan 2014 to present	Other (Member)	APK Minerals LLC Madisonville, Louisiana	Corporation	n/a
7	Jan 1980 to present	Other (President)	Allied Builders Supply Inc. Madisonville, Louisiana	Corporation	n/a
8	May 1999 to present	Other (Member)	A.P. Kennedy Family Securities LLC Madisonville, Louisiana	Corporation	n/a
9	May 1999 to present	Other (Member)	A.P. Kennedy Family Real Estate LLC Madisonville, Louisiana	Corporation	n/a

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	May 2024	HarperCollins Publishers LLC New York, NY	Other (Book Agreement)	Agreement to publish non-fiction book.	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? **This is not my first report.**

Attachments & Comments

No attachments added.

No comments added.