



Filing ID #10067959

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. John W. Rose  
**Status:** Member  
**State/District:** TN06

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 09/12/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Anthem CityLine/Bay Capital Partners, LP, 1% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$2,501 - \$5,000	<input type="checkbox"/>
LOCATION: Richardson, TX, US DESCRIPTION: Limited partner in entity that owns multi-family residential development. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					
Broad River/MP, LP, 1% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Beaufort, SC, US DESCRIPTION: Limited partner in entity that owns multi-family residential development. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a loss for the year.					
CHIPS III AC, LP, 1% Interest [OL]		\$15,001 - \$50,000	Capital Gains, K-1, LP Income	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Nashville, TN, US DESCRIPTION: This represents the aggregate value of the investment in the LP. The amount of income represents the aggregate distributions from the LP for all assets in the associated Asset Class. The K-1 from this LP reflects a net loss for the year.					
Citizens Bank, Carthage, TN Accounts [BA]		\$50,001 - \$100,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Personal and farm operating, interest bearing checking accounts and checking account of spouse.					
Citizens Bank, Carthage, TN Stock [PS]		\$500,001 - \$1,000,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Stock in community bank.					
Farm Trust [RP]		\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: DeKalb, TN, TN, US DESCRIPTION: Beneficial owner of farm real estate held in trust.					
First Farmers and Merchants Corp., Columbia, TN Stock [PS]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: Stock in community bank.					
First Freedom Bancshares, Lebanon, TN Stock [PS]		\$1,000,001 - \$5,000,000	Dividends	None	<input type="checkbox"/>
DESCRIPTION: Stock in community bank.					
First Freedom Bank, Lebanon, TN Account [BA]		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Personal money market account.					
First National Bank of Tennessee, Livingston, TN Accounts [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Personal interest bearing checking account and personal savings account of dependent child.					
Heyward/HK, LP, 1% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$5,001 - \$15,000	<input type="checkbox"/>
LOCATION: Charleston, SC, US DESCRIPTION: Limited partner in entity that owns multi-family residential development. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a lower net income for the year. This property was acquired through a 1031 tax deferred exchange during 2021 upon the sale of Hunter's Creek Apartments, LP and Lofts at Savannah Park.					
John Rose for Tennessee Campaign Loan, Cookeville, TN [DO]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
DESCRIPTION: Loan to John Rose for Tennessee campaign for Tennessee's 6th District seat in the United States House of Representatives. No interest is presently being charged.					
Nationwide Life Insurance Whole Life Policy [WU]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Cash surrender value of whole life policy on the life of John W. Rose.					
Pavilion Land Partnership, LP, 1% Interest [OL]		\$1,001 - \$15,000	K-1, LP Income	\$1,001 - \$2,500	<input type="checkbox"/>
LOCATION: Columbia, SC, US DESCRIPTION: Limited partner in entity that owns undeveloped land in Columbia, SC. There was no income from this partnership for the year. The K-1 from this LP reflects no net income for the year.					
Pinnacle National Bank, Nashville, TN Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Personal money market account.					
Rose Farm, 100% Interest [FA]		\$5,000,001 - \$25,000,000	Farm Income	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: DeKalb / Smith / Putnam, TN, US DESCRIPTION: The farm incurred a net loss in the reporting year. Income reported is gross revenue for the calendar year. The farm produces cattle, corn, hay, soybeans, timber, tobacco, and wheat.					
Smith Fork Ventures, Inc. Demand Note, Nashville, TN [DO]		\$5,000,001 - \$25,000,000	Interest	\$100,001 - \$1,000,000	<input type="checkbox"/>
DESCRIPTION: Demand note to business.					
Smith Fork Ventures, Inc., Nashville, TN, 92% Interest [OL]		\$5,000,001 - \$25,000,000	K-1, S Corp Income	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Nashville, TN, US DESCRIPTION: Smith Fork Ventures, Inc. wholly owns Boson Holdings, LLC which in turn wholly owns Boson Software, LLC and Boson Training, LLC. All of the Boson LLCs are disregarded entities for tax purposes.					
Sun Life Assurance Company Whole Life Policy [WU]		\$500,001 - \$1,000,000	None		<input type="checkbox"/>
DESCRIPTION: Cash surrender value of whole life policy on life of John W. Rose.					
Tennessee Farmers Assurance Co., Columbia, TN Stock [PS]		\$15,001 - \$50,000	None		<input type="checkbox"/>
DESCRIPTION: Stock in Tennessee-based property and casualty insurance company affiliated with Tennessee Farm Bureau Federation.					
Tennessee Farmers Life Insurance Company Fixed Annuity [FN]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Fixed annuity.					
Tennessee Farmers Life Insurance Company Universal Life Policy [WU]		\$50,001 - \$100,000	None		<input type="checkbox"/>
DESCRIPTION: Cash surrender value of universal life policy on life of John W. Rose.					
Tennessee Farmers Life Insurance Co., Columbia, TN Stock [PS]		\$250,001 - \$500,000	None		<input type="checkbox"/>
DESCRIPTION: Stock in Tennessee-based life insurance company affiliated with the Tennessee Farm Bureau Federation.					
Boson Holdings, LLC 401K Plan ⇒ American Funds 2030 TRGT Date Retire R2E RBEEEX [MF]		\$500,001 - \$1,000,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investments held in company 401K and Roth 401K plan. 401K investments are managed by American Funds.					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Avere Southside Quarter, 10% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$1 - \$200	<input type="checkbox"/>
LOCATION: Jacksonville, FL, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
<p>DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.</p>					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Azora at Cypress Ranch, 12% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$1 - \$200	<input type="checkbox"/>
<p>LOCATION: Lutz (Tampa MSA), FL, US</p> <p>DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.</p>					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Brookleigh Flats, 14% Interest [OL]		\$100,001 - \$250,000	K-1, LP Income	\$201 - \$1,000	<input type="checkbox"/>
<p>LOCATION: Atlanta, GA, US</p> <p>DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.</p>					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Duet, 8% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$1 - \$200	<input type="checkbox"/>
<p>LOCATION: Nashville, TN, US</p> <p>DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.</p>					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Gibson Flowery Branch, 12% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$1 - \$200	<input type="checkbox"/>
<p>LOCATION: Atlanta, GA, US</p> <p>DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.</p>					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Note 16, 3% Interest [OL]		\$15,001 - \$50,000	K-1, LP Income	\$1 - \$200	<input type="checkbox"/>
<p>LOCATION: Nashville, TN, US</p> <p>DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.</p>					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ The Artessa, 11% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$1 - \$200	<input type="checkbox"/>
<p>LOCATION: Franklin, TN, US</p> <p>DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.</p>					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ The Collins, 13% Interest [OL]		\$50,001 - \$100,000	K-1, LP Income	\$1 - \$200	<input type="checkbox"/>
LOCATION: Charlotte, NC, US DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ The Edge, 18% Interest [OL]		\$100,001 - \$250,000	K-1, LP Income	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Atlanta, GA, US DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					
Chelsea Brooke Rose IRA ⇒ JPMorgan Investor Growth Fund CL C M/F [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Mutual fund held within wife's IRA.					
Chelsea Brooke Rose IRA ⇒ Raymond James Bank Deposit Program [BA]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Money market portion of Wife's IRA account.					
CHIPS III AC, LP ⇒ Anthem CityLine, 33% Interest [OL]		\$1,001 - \$15,000	K-1, LP Income	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Richardson, TX, US DESCRIPTION: This property is owned by CHIPS III AC, LP. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property.					
CHIPS III AC, LP ⇒ Parc at Broad River, 36% Interest [OL]		\$1,001 - \$15,000	K-1, LP Income	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Beaufort, SC, US DESCRIPTION: This property is owned by CHIPS III AC, LP. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property.					
CHIPS III AC, LP ⇒ Whitepalm, 30% Interest [OL]		\$1,001 - \$15,000	K-1, LP Income	\$201 - \$1,000	<input type="checkbox"/>
LOCATION: Port Orange, FL, US DESCRIPTION: This property is owned by CHIPS III AC, LP. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property.					
John Williams Rose RIRA ⇒ AB Relative Value Fund Class A M/F [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Bank of America Corporation (BAC) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Coherent Corp. (COHR) [ST]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Fidelity Advisor Small Cap Fund Class M M/F [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ FIMM Money Market (FNSXX) [BA]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Money market funds within RIRA.					
John Williams Rose RIRA ⇒ Invesco EQV International Equity Fund Class A [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ INVESCO Income Advantage U.S. Fund Class A [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Massachusetts Investors Growth Stock Fund Class C M/F [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ MFS Growth Fund Class A M/F [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ MFS Mid Cap Growth Fund Class C M/F [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Microsoft Corporation (MSFT) [ST]		\$250,001 - \$500,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Raymond James Bank Deposit Program [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ Thornburg Small Mid Cap Core Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: Investment held in personal Roth IRA Account.					
John Williams Rose RIRA ⇒ VOC Energy Trust Units of Beneficial Interest (VOC) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Investment held in personal Roth IRA Account.					
Raymond James Brokerage Account ⇒ Alphabet Inc. - Class A (GOOGL) [ST]		\$250,001 - \$500,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$250,001 - \$500,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ AMCAP Fund Class A-American Funds M/F [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$5,001 - \$15,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Capital World Growth & Income Fund Class A- American FD M/F [MF]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Europacific Growth Fund Class A-American Funds M/F [MF]		\$250,001 - \$500,000	Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ FIMM Money Market (FNSXX) [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
DESCRIPTION: Money market funds in brokerage account.					
Raymond James Brokerage Account ⇒ Growth Fund of America Class A-American Funds M/F [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$50,001 - \$100,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Investment Company of America Class A-American Funds M/F [MF]		\$250,001 - \$500,000	Capital Gains, Dividends	\$15,001 - \$50,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Microsoft Corporation (MSFT) [ST]		\$500,001 - \$1,000,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Raymond James Client Interest Program [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Raymond James Brokerage Account ⇒ Smallcap World Fund Class A-American Funds M/F [MF]		\$500,001 - \$1,000,000	Capital Gains, Dividends	\$2,501 - \$5,000	<input type="checkbox"/>

\* 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 B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Carter-Haston Multifamily Value Fund V HNW, L.P. ⇒ Avere Southside Quarter, 10% Interest [OL]		01/18/2024	P	\$15,001 - \$50,000	
LOCATION: Jacksonville, FL, US DESCRIPTION: This property is owned by Carter-Haston Multifamily Value Fund V HNW, L.P. Income is the portion of the LP income attributable to this property. Percent interest is percent of total partnership capital that is attributable to this property. The amount of income represents the aggregate distributions from the LP. The K-1 from this LP reflects a net income loss for the year.					
John Rose for Tennessee Campaign Loan, Cookeville, TN [DO]		08/01/2024	P	\$50,001 - \$100,000	
DESCRIPTION: Additional loan extended to campaign account. No interest is being charged at present.					
John Rose for Tennessee Campaign Loan, Cookeville, TN [DO]		11/05/2024	P	\$50,001 - \$100,000	
DESCRIPTION: Additional loan extended to campaign account. No interest is being charged at present.					

\* 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
Tennessee FFA Foundation, Inc.	Spouses compensation	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Discover	December 2024	Monthly balance on credit card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Tennessee Technological University Foundation, Inc. (TN Nonprofit)
Director	Tech Farms, LLC (TN Nonprofit LLC)
Limited Partner	Carter-Haston Investment Partners III AC, LP
Limited Partner	Bay Capital Partners, LP



Position	Name of Organization
Limited Partner	Pavilion Land Partnership, LP
President	Smith Fork Ventures, Inc.
Limited Partner	Broad River/MP, LP
Sponsoring Committee Member	Tennessee Future Farmers of America Foundation, Inc.
Limited Partner	Heyward/HK, LP
Limited Partner	Carter-Haston Multifamily Value Fund V HNW, L.P.

**SCHEDULE F: AGREEMENTS**

None disclosed.

**SCHEDULE G: GIFTS**

None disclosed.

**SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS**

None disclosed.

**SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA**

None disclosed.

**SCHEDULE A AND B INVESTMENT VEHICLE DETAILS**

<ul style="list-style-type: none"><li>◦ CHIPS III AC, LP (1% Interest) LOCATION: Nashville, TN, US DESCRIPTION: Ownership % is 0.432%.</li><li>◦ Boson Holdings, LLC 401K Plan DESCRIPTION: Boson Holdings, LLC is a single member LLC and wholly owned by Smith Fork Ventures, Inc. The 401k plan investments are managed by American Funds.</li><li>◦ John Williams Rose RIRA DESCRIPTION: Raymond James Financial Services Roth IRA account.</li><li>◦ Raymond James Brokerage Account (100% Interest) LOCATION: Nashville, TN, US DESCRIPTION: John Williams Rose Brokerage Account.</li><li>◦ Chelsea Brooke Rose IRA (Owner: SP) DESCRIPTION: Raymond James Financial Services IRA of wife.</li><li>◦ Carter-Haston Multifamily Value Fund V HNW, L.P. (1% Interest) LOCATION: Nashville, Davidson, TN, US DESCRIPTION: Ownership % of capital is 0.3556492% of Limited Partnership.</li></ul>
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## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**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

## 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. John W. Rose , 09/12/2025